

**State Plan for the State Vocational Rehabilitation Services Program
and
State Plan Supplement for the State Supported Employment Services Program
Montana State Plan for Fiscal Year 2010 (submitted FY 2009)**

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Preprint

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**State Plan for the State Vocational Rehabilitation Services Program
and
State Plan Supplement for the State Supported Employment Services Program
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Section 1: State Certifications

- 1.1 The (enter the name of designated state agency or designated state unit below)...
- Dept. of Public Health and Human Services Disability Services Division
- ... is authorized to submit this State Plan under Title I of the Rehabilitation Act of 1973, as amended ^[1] and its supplement under Title VI, Part B, of the Rehabilitation Act ^[2].
- 1.2 As a condition for the receipt of federal funds under Title I, Part B, of the Rehabilitation Act for the provision of vocational rehabilitation services, the... (enter the name of the designated state agency below) ^[3]
- Dept. of Public Health and Human Services Disability Services Division
- ... agrees to operate and administer the State Vocational Rehabilitation Services Program in accordance with the provisions of this State Plan ^[4], the Rehabilitation Act, and all applicable regulations ^[5], policies and procedures established by the secretary. Funds made available under Section 111 of the Rehabilitation Act are used solely for the provision of vocational rehabilitation services under Title I of the Rehabilitation Act and the administration of the State Plan for the vocational rehabilitation services program.
- 1.3 As a condition for the receipt of federal funds under Title VI, Part B, of the Rehabilitation Act for supported employment services, the designated state agency agrees to operate and administer the State Supported Employment Services Program in accordance with the provisions of the supplement to this State Plan ^[6], the Rehabilitation Act and all applicable regulations ^[7], policies and procedures established by the secretary. Funds made available under Title VI, Part B, are used solely for the provision of supported employment services and the administration of the supplement to the Title I State Plan. Yes

1.4 The designated state agency and/or the designated state unit has the authority under state law to perform the functions of the state regarding this State Plan and its supplement. Yes

1.5 The state legally may carry out each provision of the State Plan and its supplement. Yes

1.6 All provisions of the State Plan and its supplement are consistent with state law. Yes

1.7 The (enter title of state officer below)

Fiscal Bureau Chief

... has the authority under state law to receive, hold and disburse federal funds made available under this State Plan and its supplement. Yes

1.8 The (enter title of state officer below)...

Disability Services Division Administrator

... has the authority to submit this State Plan for vocational rehabilitation services and the State Plan supplement for supported employment services. Yes

1.9 The agency that submits this State Plan and its supplement has adopted or otherwise formally approved the plan and its supplement. Yes

Signed?

Name of Signatory

Peggy Williams

Title of Signatory

Acting Disability Services Division
Administrator

Date Signed (mm/dd/yyyy)

Section 1 Footnotes

- [1] Public Law 93 112, as amended by Public Laws 93 516, 95 602, 98 221, 99 506, 100-630, 102-569, 103-073, and 105-220.
- [2] Unless otherwise stated, "Rehabilitation Act" means the Rehabilitation Act of 1973, as amended.
- [3] All references in this plan to "designated state agency" or to "the state agency" relate to the agency identified in this paragraph.
- [4] No funds under Title I of the Rehabilitation Act may be awarded without an approved State Plan in accordance with Section 101(a) of the Rehabilitation Act and 34 CFR part 361.
- [5] Applicable regulations include the Education Department General Administrative Regulations (EDGAR) in 34 CFR Parts 74, 76, 77, 79, 80, 81, 82, 85 and 86 and the State Vocational Rehabilitation Services Program regulations in 34 CFR Part 361.
- [6] No funds under Title VI, Part B, of the Rehabilitation Act may be awarded without an approved supplement to the Title I State Plan in accordance with Section 625(a) of the Rehabilitation Act.
- [7] Applicable regulations include the EDGAR citations in footnote 5, 34 CFR Part 361, and 34 CFR Part 363.

Section 2: Public Comment on State Plan Policies and Procedures

2.1 Public participation requirements. (Section 101(a)(16)(A) of the Rehabilitation Act; 34 CFR 361.10(d), .20(a), (b), (d); and 363.11(g)(9))

(a) Conduct of public meetings.

The designated state agency, prior to the adoption of any substantive policies or procedures governing the provision of vocational rehabilitation services under the State Plan and supported employment services under the supplement to the State Plan, including making any substantive amendments to the policies and procedures, conducts public meetings throughout the state to provide the public, including individuals with disabilities, an opportunity to comment on the policies or procedures.

(b) Notice requirements.

The designated state agency, prior to conducting the public meetings, provides appropriate and sufficient notice throughout the state of the meetings in accordance with state law governing public meetings or, in the absence of state law governing public meetings, procedures developed by the state agency in consultation with the State Rehabilitation Council, if the agency has a council.

(c) Special consultation requirements.

The state agency actively consults with the director of the Client

Assistance Program, the State Rehabilitation Council, if the agency has a council and, as appropriate, Indian tribes, tribal organizations and native Hawaiian organizations on its policies and procedures governing the provision of vocational rehabilitation services under the State Plan and supported employment services under the supplement to the State Plan.

Section 3: Submission of the State Plan and its Supplement

- 3.1 Submission and revisions of the State Plan and its supplement. (Sections 101(a)(1), (23) and 625(a)(1) of the Rehabilitation Act; Section 501 of the Workforce Investment Act; 34 CFR 76.140; 361.10(e), (f), and (g); and 363.10)
- (a) The state submits to the commissioner of the Rehabilitation Services Administration the State Plan and its supplement on the same date that the state submits either a State Plan under Section 112 of the Workforce Investment Act of 1998 or a state unified plan under Section 501 of that Rehabilitation Act.
 - (b) The state submits only those policies, procedures or descriptions required under this State Plan and its supplement that have not been previously submitted to and approved by the commissioner.
 - (c) The state submits to the commissioner, at such time and in such manner as the commissioner determines to be appropriate, reports containing annual updates of the information relating to the:
 - comprehensive system of personnel development;
 - assessments, estimates, goals and priorities, and reports of progress;
 - innovation and expansion activities; and
 - other updates of information required under Title I, Part B, or Title VI, Part B, of the Rehabilitation Act that are requested by the commissioner.
 - (d) The State Plan and its supplement are in effect subject to the submission of modifications the state determines to be necessary or the commissioner requires based on a change in state policy, a change in federal law, including regulations, an interpretation of the Rehabilitation Act by a federal court or the highest court of the state, or a finding by the commissioner of state noncompliance with the requirements of the Rehabilitation Act, 34 CFR 361 or 34 CFR 363.

- 3.2 Supported Employment State Plan supplement. (Sections 101(a)(22) and 625(a) of the Rehabilitation Act; 34 CFR 361.34 and 363.10)
- (a) The state has an acceptable plan for carrying out Part B, of Title VI of the Rehabilitation Act that provides for the use of funds under that part to supplement funds made available under Part B, of Title I of the Rehabilitation Act for the cost of services leading to supported employment.
 - (b) The Supported Employment State Plan, including any needed annual revisions, is submitted as a supplement to the State Plan.

Section 4: Administration of the State Plan

- 4.1 Designated state agency and designated state unit. (Section 101(a)(2) of the Rehabilitation Act; 34 CFR 361.13(a) and (b))

- (a) Designated state agency.

- (1) There is a state agency designated as the sole state agency to administer the State Plan or to supervise its administration in a political subdivision of the state by a sole local agency.
- (2) The designated state agency is:

- | | |
|-----|---|
| No | (A) a state agency that is primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities; or |
| Yes | (B) a state agency that is not primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities and includes a vocational rehabilitation unit as provided in paragraph (b) of this section. |
- (3) In American Samoa, the designated state agency is the governor.

- (b) Designated state unit.

- (1) If the designated state agency is not primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities, in accordance with subparagraph 4.1(a)(2)(B) of this section, the state agency includes a vocational rehabilitation bureau, division or unit that:

- (A) is primarily concerned with vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities and is responsible for the administration of the designated state agency's vocational rehabilitation program under the State Plan;
 - (B) has a full-time director;
 - (C) has a staff, at least 90 percent of whom are employed full-time on the rehabilitation work of the organizational unit; and
 - (D) is located at an organizational level and has an organizational status within the designated state agency comparable to that of other major organizational units of the designated state agency.
- (2) The name of the designated state Disability Services Division vocational rehabilitation unit is

4.2 State independent commission or State Rehabilitation Council. (Sections 101(a)(21) and 105 of the Rehabilitation Act; 34 CFR 361.16 and .17)
The State Plan must contain one of the following assurances.

No (a) The designated state agency is an independent state commission that:

- (1) is responsible under state law for operating or overseeing the operation of the vocational rehabilitation program in the state and is primarily concerned with the vocational rehabilitation or vocational and other rehabilitation of individuals with disabilities in accordance with subparagraph 4.1(a)(2)(A) of this section.
- (2) is consumer controlled by persons who:
 - (A) are individuals with physical or mental impairments that substantially limit major life activities; and
 - (B) represent individuals with a broad range of disabilities, unless the designated state unit under the direction of the commission is the state agency for individuals who are blind;
- (3) includes family members, advocates or other representatives of individuals with mental impairments; and
- (4) undertakes the functions set forth in Section 105(c)(4) of the Rehabilitation Act and 34 CFR 361.17(h)(4).

or

Yes (b) The state has established a State Rehabilitation Council that meets the criteria set forth in Section 105 of the Rehabilitation Act, 34 CFR 361.17 and the designated state unit:

- (1) jointly with the State Rehabilitation Council develops, agrees to and

reviews annually state goals and priorities and jointly submits to the commissioner annual reports of progress in accordance with the provisions of Section 101(a)(15) of the Rehabilitation Act, 34 CFR 361.29 and subsection 4.11 of this State Plan;

- (2) regularly consults with the State Rehabilitation Council regarding the development, implementation and revision of state policies and procedures of general applicability pertaining to the provision of vocational rehabilitation services;
- (3) includes in the State Plan and in any revision to the State Plan a summary of input provided by the State Rehabilitation Council, including recommendations from the annual report of the council described in Section 105(c)(5) of the Rehabilitation Act and 34 CFR 361.17(h)(5), the review and analysis of consumer satisfaction described in Section 105(c)(4) of the Rehabilitation Act and 34 CFR 361.17(h)(4), and other reports prepared by the council and the response of the designated state unit to the input and recommendations, including explanations for rejecting any input or recommendation; and
- (4) transmits to the council:
 - (A) all plans, reports and other information required under 34 CFR 361 to be submitted to the commissioner;
 - (B) all policies and information on all practices and procedures of general applicability provided to or used by rehabilitation personnel in carrying out this State Plan and its supplement; and
 - (C) copies of due process hearing decisions issued under 34 CFR 361.57, which are transmitted in such a manner as to ensure that the identity of the participants in the hearings is kept confidential.

- (c) If the designated state unit has a State Rehabilitation Council, Attachment 4.2(c) provides a summary of the input provided by the council consistent with the provisions identified in subparagraph (b)(3) of this section; the response of the designated state unit to the input and recommendations; and, explanations for the rejection of any input or any recommendation.

4.3 Consultations regarding the administration of the State Plan. (Section 101(a)(16)(B) of the Rehabilitation Act; 34 CFR 361.21)

The designated state agency takes into account, in connection with matters of general policy arising in the administration of the plan and its supplement, the views of:

- (a) individuals and groups of individuals who are recipients of vocational rehabilitation services or, as appropriate, the individuals' representatives;
- (b) personnel working in programs that provide vocational rehabilitation services to individuals with disabilities;
- (c) providers of vocational rehabilitation services to individuals with disabilities;
- (d) the director of the Client Assistance Program; and
- (e) the State Rehabilitation Council, if the state has a council.

4.4 Nonfederal share. (Sections 7(14) and 101(a)(3) of the Rehabilitation Act; 34 CFR 80.24 and 361.60)

The nonfederal share of the cost of carrying out this State Plan is 21.3 percent and is provided through the financial participation by the state or, if the state elects, by the state and local agencies.

4.5 Local administration. (Sections 7(24) and 101(a)(2)(A) of the Rehabilitation Act; 34 CFR 361.5(b)(47) and .15)

The State Plan provides for the administration of the plan by a local agency.

No

If "Yes", the designated state agency:

- (a) ensures that each local agency is under the supervision of the designated state unit with the sole local agency, as that term is defined in Section 7(24) of the Rehabilitation Act and 34 CFR 361.5(b)(47), responsible for the administration of the vocational rehabilitation program within the political subdivision that it serves; and
- (b) develops methods that each local agency will use to administer the vocational rehabilitation program in accordance with the State Plan.

4.6 Shared funding and administration of joint programs. (Section 101(a)(2)(A)(ii) of the Rehabilitation Act; 34 CFR 361.27)

The State Plan provides for the state agency to share funding and administrative responsibility with another state agency or local public agency to carry out a joint program to provide services to individuals with disabilities.

No

If "Yes", the designated state agency submits to the commissioner for approval a plan that describes its shared funding and administrative

arrangement. The plan must include:

- (a) a description of the nature and scope of the joint program;
- (b) the services to be provided under the joint program;
- (c) the respective roles of each participating agency in the administration and provision of services; and
- (d) the share of the costs to be assumed by each agency.

4.7 Statewideness and waivers of statewideness. (Section 101(a)(4) of the Rehabilitation Act; 34 CFR 361.25, .26, and .60(b)(3)(i) and (ii))

- (a) Services provided under the State Plan are available in all political subdivisions of the state.
- (b) The state unit may provide services in one or more political subdivisions of the state that increase services or expand the scope of services that are available statewide under this State Plan if the:
 - (1) nonfederal share of the cost of these services is met from funds provided by a local public agency, including funds contributed to a local public agency by a private agency, organization or individual;
 - (2) services are likely to promote the vocational rehabilitation of substantially larger numbers of individuals with disabilities or of individuals with disabilities with particular types of impairments; and
 - (3) state, for purposes other than the establishment of a community rehabilitation program or the construction of a particular facility for community rehabilitation program purposes, requests in Attachment 4.7(b)(3) a waiver of the statewideness requirement in accordance with the following requirements:
 - (A) identification of the types of services to be provided;
 - (B) written assurance from the local public agency that it will make available to the state unit the nonfederal share of funds;
 - (C) written assurance that state unit approval will be obtained for each proposed service before it is put into effect; and
 - (D) written assurance that all other State Plan requirements, including a state's order of selection, will apply to all services approved under the waiver.
- (c) Contributions, consistent with the requirements of 34 CFR 361.60(b)(3)(ii), by private entities of earmarked funds for particular geographic areas within the state may be used as part of the nonfederal share without the state requesting a waiver of the statewideness requirement provided that

the state notifies the commissioner that it cannot provide the full nonfederal share without using the earmarked funds.

4.8 Cooperation, collaboration and coordination. (Sections 101(a)(11), (24)(B), and 625(b)(4) and (5) of the Rehabilitation Act; 34 CFR 361.22, .23, .24, and .31, and 363.11(e))

(a) Cooperative agreements with other components of statewide work force investment system.

The designated state agency or the designated state unit has cooperative agreements with other entities that are components of the statewide work force investment system and replicates those agreements at the local level between individual offices of the designated state unit and local entities carrying out the One-Stop service delivery system or other activities through the statewide work force investment system.

(b) Cooperation and coordination with other agencies and entities.

Attachment 4.8(b) (1)-(4) describes the designated state agency's:

- (1) cooperation with and use of the services and facilities of the federal, state, and local agencies and programs, including programs carried out by the undersecretary for Rural Development of the United States Department of Agriculture and state use contracting programs, to the extent that those agencies and programs are not carrying out activities through the statewide work force investment system;
- (2) coordination, in accordance with the requirements of paragraph 4.8(c) of this section, with education officials to facilitate the transition of students with disabilities from school to the receipt of vocational rehabilitation services;
- (3) establishment of cooperative agreements with private nonprofit vocational rehabilitation service providers, in accordance with the requirements of paragraph 5.10(b) of the State Plan; and,
- (4) efforts to identify and make arrangements, including entering into cooperative agreements, with other state agencies and entities with respect to the provision of supported employment and extended services for individuals with the most significant disabilities, in accordance with the requirements of subsection 6.5 of the supplement to this State Plan.

(c) Coordination with education officials.

- (1) Attachment 4.8(b)(2) describes the plans, policies and procedures for coordination between the designated state agency and education

officials responsible for the public education of students with disabilities that are designed to facilitate the transition of the students who are individuals with disabilities from the receipt of educational services in school to the receipt of vocational rehabilitation services under the responsibility of the designated state agency.

(2) The State Plan description must:

- (A) provide for the development and approval of an individualized plan for employment in accordance with 34 CFR 361.45 as early as possible during the transition planning process but, at the latest, before each student determined to be eligible for vocational rehabilitation services leaves the school setting or if the designated state unit is operating on an order of selection before each eligible student able to be served under the order leaves the school setting; and
- (B) include information on a formal interagency agreement with the state educational agency that, at a minimum, provides for:
 - (i) consultation and technical assistance to assist educational agencies in planning for the transition of students with disabilities from school to postschool activities, including vocational rehabilitation services;
 - (ii) transition planning by personnel of the designated state agency and the educational agency for students with disabilities that facilitates the development and completion of their individualized education programs under Section 614(d) of the Individuals with Disabilities Education Act;
 - (iii) roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining state lead agencies and qualified personnel responsible for transition services; and
 - (iv) procedures for outreach to students with disabilities as early as possible during the transition planning process and identification of students with disabilities who need transition services.
- (d) Coordination with statewide independent living council and independent living centers.

The designated state unit, the Statewide Independent Living Council established under Section 705 of the Rehabilitation Act and 34 CFR 364, and the independent living centers described in Part C of Title VII of the Rehabilitation Act and 34 CFR 366 have developed working relationships and coordinate their activities.

(e) Cooperative agreement with recipients of grants for services to American Indians.

(1) There is in the state a recipient(s) of a grant under Part C of Title I of the Rehabilitation Act for the provision of vocational rehabilitation services for American Indians who are individuals with disabilities residing on or near federal and state reservations.

Yes

(2) If "Yes", the designated state agency has entered into a formal cooperative agreement that meets the following requirements with each grant recipient in the state that receives funds under Part C of Title I of the Rehabilitation Act:

- (A) strategies for interagency referral and information sharing that will assist in eligibility determinations and the development of individualized plans for employment;
- (B) procedures for ensuring that American Indians who are individuals with disabilities and are living near a reservation or tribal service area are provided vocational rehabilitation services; and
- (C) provisions for sharing resources in cooperative studies and assessments, joint training activities, and other collaborative activities designed to improve the provision of services to American Indians who are individuals with disabilities.

4.9 Methods of administration. (Section 101(a)(6) of the Rehabilitation Act; 34 CFR 361.12, .19 and .51(a) and (b))

(a) In general.

The state agency employs methods of administration, including procedures to ensure accurate data collection and financial accountability, found by the commissioner to be necessary for the proper and efficient administration of the plan and for carrying out all the functions for which the state is responsible under the plan and 34 CFR 361.

(b) Employment of individuals with disabilities.

The designated state agency and entities carrying out community rehabilitation programs in the state, who are in receipt of assistance under Part B, of Title I of the Rehabilitation Act and this State Plan, take affirmative action to employ and advance in employment qualified individuals with disabilities covered under and on the same terms and conditions as set forth in Section 503 of the Rehabilitation Act.

(c) Facilities.

Any facility used in connection with the delivery of services assisted under this State Plan meets program accessibility requirements consistent with the provisions, as applicable, of the Architectural Barriers Rehabilitation Act of 1968, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act of 1990 and the regulations implementing these laws.

4.10 Comprehensive system of personnel development. (Section 101(a)(7) of the Rehabilitation Act; 34 CFR 361.18)

Attachment 4.10 describes the designated state agency's procedures and activities to establish and maintain a comprehensive system of personnel development designed to ensure an adequate supply of qualified state rehabilitation professional and paraprofessional personnel for the designated state unit. The description includes the following:

(a) Data system on personnel and personnel development.

Development and maintenance of a system for collecting and analyzing on an annual basis data on qualified personnel needs and personnel development with respect to:

(1) Qualified personnel needs.

- (A) The number of personnel who are employed by the state agency in the provision of vocational rehabilitation services in relation to the number of individuals served, broken down by personnel category;
- (B) The number of personnel currently needed by the state agency to provide vocational rehabilitation services, broken down by personnel category; and
- (C) Projections of the number of personnel, broken down by personnel category, who will be needed by the state agency to provide vocational rehabilitation services in the state in five years based on projections of the number of individuals to be served, including individuals with significant disabilities, the number of personnel expected to retire or leave the field, and other relevant factors.

(2) Personnel development.

- (A) A list of the institutions of higher education in the state that are preparing vocational rehabilitation professionals, by type of program;
- (B) The number of students enrolled at each of those institutions, broken down by type of program; and
- (C) The number of students who graduated during the prior year from

each of those institutions with certification or licensure, or with the credentials for certification or licensure, broken down by the personnel category for which they have received, or have the credentials to receive, certification or licensure.

(b) Plan for recruitment, preparation and retention of qualified personnel.

Development, updating on an annual basis, and implementation of a plan to address the current and projected needs for qualified personnel based on the data collection and analysis system described in paragraph (a) of this subsection and that provides for the coordination and facilitation of efforts between the designated state unit and institutions of higher education and professional associations to recruit, prepare and retain personnel who are qualified in accordance with paragraph (c) of this subsection, including personnel from minority backgrounds and personnel who are individuals with disabilities.

(c) Personnel standards.

Policies and procedures for the establishment and maintenance of personnel standards to ensure that designated state unit professional and paraprofessional personnel are appropriately and adequately prepared and trained, including:

- (1) standards that are consistent with any national- or state-approved or recognized certification, licensing, registration, or, in the absence of these requirements, other comparable requirements (including state personnel requirements) that apply to the profession or discipline in which such personnel are providing vocational rehabilitation services.
- (2) To the extent that existing standards are not based on the highest requirements in the state applicable to a particular profession or discipline, the steps the state is currently taking and the steps the state plans to take in accordance with the written plan to retrain or hire personnel within the designated state unit to meet standards that are based on the highest requirements in the state, including measures to notify designated state unit personnel, the institutions of higher education identified in subparagraph (a)(2), and other public agencies of these steps and the time lines for taking each step.
- (3) The written plan required by subparagraph (c)(2) describes the following:
 - (A) specific strategies for retraining, recruiting and hiring personnel;
 - (B) the specific time period by which all state unit personnel will meet the standards required by subparagraph (c)(1);

- (C) procedures for evaluating the designated state unit's progress in hiring or retraining personnel to meet applicable personnel standards within the established time period; and
- (D) the identification of initial minimum qualifications that the designated state unit will require of newly hired personnel when the state unit is unable to hire new personnel who meet the established personnel standards and the identification of a plan for training such individuals to meet the applicable standards within the time period established for all state unit personnel to meet the established personnel standards.

(d) Staff development.

Policies, procedures and activities to ensure that all personnel employed by the designated state unit receive appropriate and adequate training. The narrative describes the following:

- (1) A system of staff development for professionals and paraprofessionals within the designated state unit, particularly with respect to assessment, vocational counseling, job placement and rehabilitation technology.
- (2) Procedures for the acquisition and dissemination to designated state unit professionals and paraprofessionals significant knowledge from research and other sources.

(e) Personnel to address individual communication needs.

Availability of personnel within the designated state unit or obtaining the services of other individuals who are able to communicate in the native language of applicants or eligible individuals who have limited English speaking ability or in appropriate modes of communication with applicants or eligible individuals.

(f) Coordination of personnel development under the Individuals with Disabilities Education Act.

Procedures and activities to coordinate the designated state unit's comprehensive system of personnel development with personnel development under the Individuals with Disabilities Education Act.

4.11. Statewide assessment; annual estimates; annual state goals and priorities; strategies; and progress reports. (Sections 101(a)(15), 105(c)(2) and 625(b)(2) of the Rehabilitation Act; 34 CFR 361.17(h)(2), .29, and 363.11(b))

(a) Comprehensive statewide assessment.

- (1) Attachment 4.11(a) documents the results of a comprehensive, statewide assessment, jointly conducted every three years by the designated state unit and the State Rehabilitation Council (if the state has such a council). The assessment describes:
 - (A) the rehabilitation needs of individuals with disabilities residing within the state, particularly the vocational rehabilitation services needs of:
 - (i) individuals with the most significant disabilities, including their need for supported employment services;
 - (ii) individuals with disabilities who are minorities and individuals with disabilities who have been unserved or underserved by the vocational rehabilitation program carried out under this State Plan; and
 - (iii) individuals with disabilities served through other components of the statewide work force investment system.
 - (B) The need to establish, develop or improve community rehabilitation programs within the state.
- (2) For any year in which the state updates the assessments, the designated state unit submits to the commissioner a report containing information regarding updates to the assessments.

(b) Annual estimates.

Attachment 4.11(b) identifies on an annual basis state estimates of the:

- (1) number of individuals in the state who are eligible for services under the plan;
 - (2) number of eligible individuals who will receive services provided with funds provided under Part B of Title I of the Rehabilitation Act and under Part B of Title VI of the Rehabilitation Act, including, if the designated state agency uses an order of selection in accordance with subparagraph 5.3(b)(2) of this State Plan, estimates of the number of individuals to be served under each priority category within the order; and
 - (3) costs of the services described in subparagraph (b)(1), including, if the designated state agency uses an order of selection, the service costs for each priority category within the order.
- (c) Goals and priorities.

- (1) Attachment 4.11(c)(1) identifies the goals and priorities of the state that are jointly developed or revised, as applicable, with and agreed to by the State Rehabilitation Council, if the agency has a council, in carrying out the vocational rehabilitation and supported employment

programs.

- (2) The designated state agency submits to the commissioner a report containing information regarding any revisions in the goals and priorities for any year the state revises the goals and priorities.
- (3) Order of selection.

If the state agency implements an order of selection, consistent with subparagraph 5.3(b)(2) of the State Plan, Attachment 4.11(c)(3):

- (A) shows the order to be followed in selecting eligible individuals to be provided vocational rehabilitation services;
 - (B) provides a justification for the order; and
 - (C) identifies the service and outcome goals, and the time within which these goals may be achieved for individuals in each priority category within the order.
- (4) Goals and plans for distribution of Title VI, Part B, funds.

Attachment 4.11(c)(4) specifies, consistent with subsection 6.4 of the State Plan supplement, the state's goals and priorities with respect to the distribution of funds received under Section 622 of the Rehabilitation Act for the provision of supported employment services.

(d) Strategies.

- (1) Attachment 4.11(d) describes the strategies, including:
 - (A) the methods to be used to expand and improve services to individuals with disabilities, including how a broad range of assistive technology services and assistive technology devices will be provided to those individuals at each stage of the rehabilitation process and how those services and devices will be provided to individuals with disabilities on a statewide basis;
 - (B) outreach procedures to identify and serve individuals with disabilities who are minorities, including those with the most significant disabilities in accordance with subsection 6.6 of the State Plan supplement, and individuals with disabilities who have been unserved or underserved by the vocational rehabilitation program;
 - (C) as applicable, the plan of the state for establishing, developing or improving community rehabilitation programs;
 - (D) strategies to improve the performance of the state with respect to the evaluation standards and performance indicators established pursuant to Section 106 of the Rehabilitation Act; and

- (E) strategies for assisting other components of the statewide work force investment system in assisting individuals with disabilities.
- (2) Attachment 4.11 (d) describes how the designated state agency uses these strategies to:
 - (A) address the needs identified in the assessment conducted under paragraph 4.11(a) and achieve the goals and priorities identified in the State Plan attachments under paragraph 4.11(c);
 - (B) support the innovation and expansion activities identified in subparagraph 4.12(a)(1) and (2) of the plan; and
 - (C) overcome identified barriers relating to equitable access to and participation of individuals with disabilities in the State Vocational Rehabilitation Services Program and State Supported Employment Services Program.
- (e) Evaluation and reports of progress.
 - (1) The designated state unit and the State Rehabilitation Council, if the state unit has a council, jointly submits to the commissioner an annual report on the results of an evaluation of the effectiveness of the vocational rehabilitation program and the progress made in improving the effectiveness of the program from the previous year.
 - (2) Attachment 4.11(e)(2):
 - (A) provides an evaluation of the extent to which the goals identified in Attachment 4.11(c)(1) and, if applicable, Attachment 4.11(c)(3) were achieved;
 - (B) identifies the strategies that contributed to the achievement of the goals and priorities;
 - (C) describes the factors that impeded their achievement, to the extent they were not achieved;
 - (D) assesses the performance of the state on the standards and indicators established pursuant to Section 106 of the Rehabilitation Act; and
 - (E) provides a report consistent with paragraph 4.12(c) of the plan on how the funds reserved for innovation and expansion activities were utilized in the preceding year.

4.12 Innovation and expansion. (Section 101(a)(18) of the Rehabilitation Act; 34 CFR 361.35)

- (a) The designated state agency reserves and uses a portion of the funds allotted to the state under Section 110 of the Rehabilitation Act for the:

- (1) development and implementation of innovative approaches to expand and improve the provision of vocational rehabilitation services to individuals with disabilities under this State Plan, particularly individuals with the most significant disabilities, consistent with the findings of the statewide assessment identified in Attachment 4.11(a) and goals and priorities of the state identified in Attachments 4.11(c)(1) and, if applicable, Attachment 4.11(c)(3); and
 - (2) support of the funding for the State Rehabilitation Council, if the state has such a council, consistent with the resource plan prepared under Section 105(d)(1) of the Rehabilitation Act and 34 CFR 361.17(i), and the funding of the Statewide Independent Living Council, consistent with the resource plan prepared under Section 705(e)(1) of the Rehabilitation Act and 34 CFR 364.21(i).
- (b) Attachment 4.11 (d) describes how the reserved funds identified in subparagraph 4.12(a)(1) and (2) will be utilized.
- (c) Attachment 4.11(e)(2) describes how the reserved funds were utilized in the preceding year.

4.13 Reports. (Section 101(a)(10) of the Rehabilitation Act; 34 CFR 361.40)

- (a) The designated state unit submits reports in the form and level of detail and at the time required by the commissioner regarding applicants for and eligible individuals receiving services under the State Plan.
- (b) Information submitted in the reports provides a complete count, unless sampling techniques are used, of the applicants and eligible individuals in a manner that permits the greatest possible cross-classification of data and protects the confidentiality of the identity of each individual.

Section 5: Administration of the Provision of Vocational Rehabilitation Services

5.1 Information and referral services. (Sections 101(a)(5)(D) and (20) of the Rehabilitation Act; 34 CFR 361.37)

The designated state agency has implemented an information and referral system that is adequate to ensure that individuals with disabilities, including individuals who do not meet the agency's order of selection criteria for receiving vocational rehabilitation services if the agency is operating on an order of selection, are provided accurate vocational rehabilitation information and guidance, including counseling and referral for job placement, using appropriate modes of communication, to assist such individuals in preparing

for, securing, retaining or regaining employment, and are referred to other appropriate federal and state programs, including other components of the statewide work force investment system in the state.

5.2 Residency. (Section 101(a)(12) of the Rehabilitation Act; 34 CFR 361.42(c)(1))

The designated state unit imposes no duration of residence requirement as part of determining an individual's eligibility for vocational rehabilitation services or that excludes from services under the plan any individual who is present in the state.

5.3 Ability to serve all eligible individuals; order of selection for services. (Sections 12(d) and 101(a)(5) of the Rehabilitation Act; 34 CFR 361.36)

- (a) The designated state unit is able to provide the full range of services listed in Section 103(a) of the Rehabilitation Act and 34 CFR 361.48, as appropriate, to all eligible individuals with disabilities in the state who apply for services.

Yes

(b) If No:

- (1) Individuals with the most significant disabilities, in accordance with criteria established by the state, are selected first for vocational rehabilitation services before other individuals with disabilities.
- (2) Attachment 4.11(c)(3):
 - (A) shows the order to be followed in selecting eligible individuals to be provided vocational rehabilitation services;
 - (B) provides a justification for the order of selection; and
 - (C) identifies the state's service and outcome goals and the time within which these goals may be achieved for individuals in each priority category within the order.
- (3) Eligible individuals who do not meet the order of selection criteria have access to the services provided through the designated state unit's information and referral system established under Section 101(a)(20) of the Rehabilitation Act, 34 CFR 361.37, and subsection 5.1 of this State Plan.

5.4 Availability of comparable services and benefits. (Sections 101(a)(8) and 103(a) of the Rehabilitation Act; 34 CFR 361.53)

- (a) Prior to providing any vocational rehabilitation services, except those services identified in paragraph (b), to an eligible individual or to members of the individual's family, the state unit determines whether comparable services and benefits exist under any other program and whether those services and benefits are available to the individual.
- (b) The following services are exempt from a determination of the availability of comparable services and benefits:
 - (1) assessment for determining eligibility and vocational rehabilitation needs by qualified personnel, including, if appropriate, an assessment by personnel skilled in rehabilitation technology;
 - (2) counseling and guidance, including information and support services to assist an individual in exercising informed choice consistent with the provisions of Section 102(d) of the Rehabilitation Act;
 - (3) referral and other services to secure needed services from other agencies, including other components of the statewide work force investment system, through agreements developed under Section 101(a)(11) of the Rehabilitation Act, if such services are not available under this State Plan;
 - (4) job-related services, including job search and placement assistance, job retention services, follow-up services, and follow-along services;
 - (5) rehabilitation technology, including telecommunications, sensory and other technological aids and devices; and
 - (6) post-employment services consisting of the services listed under subparagraphs (1) through (5) of this paragraph.
- (c) The requirements of paragraph (a) of this section do not apply if the determination of the availability of comparable services and benefits under any other program would interrupt or delay:
 - (1) progress of the individual toward achieving the employment outcome identified in the individualized plan for employment;
 - (2) an immediate job placement; or
 - (3) provision of vocational rehabilitation services to any individual who is determined to be at extreme medical risk, based on medical evidence provided by an appropriate qualified medical professional.
- (d) The governor in consultation with the designated state vocational rehabilitation agency and other appropriate agencies ensures that an interagency agreement or other mechanism for interagency coordination that meets the requirements of Section 101(a)(8)(B)(i)-(iv) of the Rehabilitation Act takes effect between the designated state unit and any appropriate public entity, including the state Medicaid program, a public institution of higher education, and a component of the statewide work

force investment system to ensure the provision of the vocational rehabilitation services identified in Section 103(a) of the Rehabilitation Act and 34 CFR 361.48, other than the services identified in paragraph (b) of this section, that are included in the individualized plan for employment of an eligible individual, including the provision of those vocational rehabilitation services during the pendency of any dispute that may arise in the implementation of the interagency agreement or other mechanism for interagency coordination.

5.5 Individualized plan for employment. (Section 101(a)(9) of the Rehabilitation Act; 34 CFR 361.45 and .46)

- (a) An individualized plan for employment meeting the requirements of Section 102(b) of the Rehabilitation Act and 34 CFR 361.45 and .46 is developed and implemented in a timely manner for each individual determined to be eligible for vocational rehabilitation services, except if the state has implemented an order of selection, and is developed and implemented for each individual to whom the designated state unit is able to provide vocational rehabilitation services.
- (b) Services to an eligible individual are provided in accordance with the provisions of the individualized plan for employment.

5.6 Opportunity to make informed choices regarding the selection of services and providers. (Sections 101(a)(19) and 102(d) of the Rehabilitation Act; 34 CFR 361.52)

Applicants and eligible individuals or, as appropriate, their representatives are provided information and support services to assist in exercising informed choice throughout the rehabilitation process, consistent with the provisions of Section 102(d) of the Rehabilitation Act and 34 CFR 361.52.

5.7 Services to American Indians. (Section 101(a)(13) of the Rehabilitation Act; 34 CFR 361.30)

The designated state unit provides vocational rehabilitation services to American Indians who are individuals with disabilities residing in the state to the same extent as the designated state agency provides such services to other significant populations of individuals with disabilities residing in the state.

5.8 Annual review of individuals in extended employment or other employment

under special certificate provisions of the fair labor standards act of 1938.
(Section 101(a)(14) of the Rehabilitation Act; 34 CFR 361.55)

- (a) The designated state unit conducts an annual review and reevaluation of the status of each individual with a disability served under this State Plan:
 - (1) who has achieved an employment outcome in which the individual is compensated in accordance with Section 14(c) of the Fair Labor Standards Act (29 U.S.C. 214(c)); or
 - (2) whose record of services is closed while the individual is in extended employment on the basis that the individual is unable to achieve an employment outcome in an integrated setting or that the individual made an informed choice to remain in extended employment.
- (b) The designated state unit carries out the annual review and reevaluation for two years after the individual's record of services is closed (and thereafter if requested by the individual or, if appropriate, the individual's representative) to determine the interests, priorities and needs of the individual with respect to competitive employment or training for competitive employment.
- (c) The designated state unit makes maximum efforts, including the identification and provision of vocational rehabilitation services, reasonable accommodations and other necessary support services, to assist the individuals described in paragraph (a) in engaging in competitive employment.
- (d) The individual with a disability or, if appropriate, the individual's representative has input into the review and reevaluation and, through signed acknowledgement, attests that the review and reevaluation have been conducted.

5.9 Use of Title I funds for construction of facilities. (Sections 101(a)(17) and 103(b)(2)(A) of the Rehabilitation Act; 34 CFR 361.49(a)(1), .61 and .62(b))

If the state elects to construct, under special circumstances, facilities for community rehabilitation programs, the following requirements are met:

- (a) The federal share of the cost of construction for facilities for a fiscal year does not exceed an amount equal to 10 percent of the state's allotment under Section 110 of the Rehabilitation Act for that fiscal year.
- (b) The provisions of Section 306 of the Rehabilitation Act that were in effect prior to the enactment of the Rehabilitation Act Amendments of 1998 apply to such construction.
- (c) There is compliance with the requirements in 34 CFR 361.62(b) that ensure the use of the construction authority will not reduce the efforts of the designated state agency in providing other vocational rehabilitation

services other than the establishment of facilities for community rehabilitation programs.

5.10 Contracts and cooperative agreements. (Section 101(a)(24) of the Rehabilitation Act; 34 CFR 361.31 and .32)

(a) Contracts with for-profit organizations.

The designated state agency has the authority to enter into contracts with for-profit organizations for the purpose of providing, as vocational rehabilitation services, on-the-job training and related programs for individuals with disabilities under Part A of Title VI of the Rehabilitation Act, upon the determination by the designated state agency that for-profit organizations are better qualified to provide vocational rehabilitation services than nonprofit agencies and organizations.

(b) Cooperative agreements with private nonprofit organizations.

Attachment 4.8(b)(3) describes the manner in which the designated state agency establishes cooperative agreements with private nonprofit vocational rehabilitation service providers.

Section 6: Program Administration

6.1 Designated state agency. (Section 625(b)(1) of the Rehabilitation Act; 34 CFR 363.11(a))

The designated state agency for vocational rehabilitation services identified in paragraph 1.2 of the Title I State Plan is the state agency designated to administer the State Supported Employment Services Program authorized under Title VI, Part B, of the Rehabilitation Act.

6.2 Statewide assessment of supported employment services needs. (Section 625(b)(2) of the Rehabilitation Act; 34 CFR 363.11(b))

Attachment 4.11(a) describes the results of the comprehensive, statewide needs assessment conducted under Section 101(a)(15)(a)(1) of the Rehabilitation Act and subparagraph 4.11(a)(1) of the Title I State Plan with respect to the rehabilitation needs of individuals with most significant disabilities and their need for supported employment services, including needs related to coordination.

- 6.3 Quality, scope and extent of supported employment services. (Section 625(b)(3) of the Rehabilitation Act; 34 CFR 363.11(c) and .50(b)(2))
Attachment 6.3 describes the quality, scope and extent of supported employment services to be provided to individuals with the most significant disabilities who are eligible to receive supported employment services. The description also addresses the timing of the transition to extended services to be provided by relevant state agencies, private nonprofit organizations or other sources following the cessation of supported employment service provided by the designated state agency.
- 6.4 Goals and plans for distribution of Title VI, Part B, funds. (Section 625(b)(3) of the Rehabilitation Act; 34 CFR 363.11(d) and .20)
Attachment 4.11(c)(4) identifies the state's goals and plans with respect to the distribution of funds received under Section 622 of the Rehabilitation Act.
- 6.5 Evidence of collaboration with respect to supported employment services and extended services. (Sections 625(b)(4) and (5) of the Rehabilitation Act; 34 CFR 363.11(e))
Attachment 4.8(b)(4) describes the efforts of the designated state agency to identify and make arrangements, including entering into cooperative agreements, with other state agencies and other appropriate entities to assist in the provision of supported employment services and other public or nonprofit agencies or organizations within the state, employers, natural supports, and other entities with respect to the provision of extended services.
- 6.6 Minority outreach. (34 CFR 363.11(f))
Attachment 4.11(d) includes a description of the designated state agency's outreach procedures for identifying and serving individuals with the most significant disabilities who are minorities.
- 6.7 Reports. (Sections 625(b)(8) and 626 of the Rehabilitation Act; 34 CFR 363.11(h) and .52)
The designated state agency submits reports in such form and in accordance with such procedures as the commissioner may require and collects the information required by Section 101(a)(10) of the Rehabilitation Act separately for individuals receiving supported employment services under Part B, of Title VI and individuals receiving supported employment services under Title I of the Rehabilitation Act.

Section 7: Financial Administration

- 7.1 Five percent limitation on administrative costs. (Section 625(b)(7) of the Rehabilitation Act; 34 CFR 363.11(g)(8))
- The designated state agency expends no more than five percent of the state's allotment under Section 622 of the Rehabilitation Act for administrative costs in carrying out the State Supported Employment Services Program.
- 7.2 Use of funds in providing services. (Sections 623 and 625(b)(6)(A) and (D) of the Rehabilitation Act; 34 CFR 363.6(c)(2)(iv), .11(g)(1) and (4))
- (a) Funds made available under Title VI, Part B, of the Rehabilitation Act are used by the designated state agency only to provide supported employment services to individuals with the most significant disabilities who are eligible to receive such services.
 - (b) Funds provided under Title VI, Part B, are used only to supplement and not supplant the funds provided under Title I, Part B, of the Rehabilitation Act, in providing supported employment services specified in the individualized plan for employment.
 - (c) Funds provided under Part B of Title VI or Title I of the Rehabilitation Act are not used to provide extended services to individuals who are eligible under Part B of Title VI or Title I of the Rehabilitation Act.

Section 8: Provision of Supported Employment Services

- 8.1 Scope of supported employment services. (Sections 7(36) and 625(b)(6)(F) and (G) of the Rehabilitation Act; 34 CFR 361.5(b)(54), 363.11(g)(6) and (7))
- (a) Supported employment services are those services as defined in Section 7(36) of the Rehabilitation Act and 34 CFR 361.5(b)(54).
 - (b) To the extent job skills training is provided, the training is provided on-site.
 - (c) Supported employment services include placement in an integrated setting for the maximum number of hours possible based on the unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice of individuals with the most significant disabilities.

- 8.2 Comprehensive assessments of individuals with significant disabilities. (Sections 7(2)(B) and 625(b)(6)(B); 34 CFR 361.5(b)(6)(ii) and 363.11(g)(2))
The comprehensive assessment of individuals with significant disabilities conducted under Section 102(b)(1) of the Rehabilitation Act and funded under Title I of the Rehabilitation Act includes consideration of supported employment as an appropriate employment outcome.
- 8.3 Individualized plan for employment. (Sections 102(b)(3)(F) and 625(b)(6)(C) and (E) of the Rehabilitation Act; 34 CFR 361.46(b) and 363.11(g)(3) and (5))
- (a) An individualized plan for employment that meets the requirements of Section 102(b) of the Rehabilitation Act and 34 CFR 361.45 and .46 is developed and updated using funds under Title I.
 - (b) The individualized plan for employment:
 - (1) specifies the supported employment services to be provided;
 - (2) describes the expected extended services needed; and
 - (3) identifies the source of extended services, including natural supports, or, to the extent that it is not possible to identify the source of extended services at the time the individualized plan for employment plan is developed, a statement describing the basis for concluding that there is a reasonable expectation that sources will become available.
 - (c) Services provided under an individualized plan for employment are coordinated with services provided under other individualized plans established under other federal or state programs.

Attachment 4.2 (c)

**Summary of Input and Recommendation of the State
Rehabilitation Council; Response of the Designated State Unit;
and Explanation for Rejection of Input or Recommendations**

The Montana Vocational Rehabilitation Council advises and works with the Vocational Rehabilitation Program to improve policies, programs, delivery of services to consumers, and methods for reaching potential consumers and employers.

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The Montana Vocational Rehabilitation Council (Council) provides input and advice to Montana Vocational Rehabilitation (MVR) in accordance with the Rehabilitation Act. The Council holds meetings quarterly. These meetings are accessible and open to the public and are held in various locations statewide. The Council has two standing committees— Public Awareness and Unserved/Underserved Populations. Policy and program issues are discussed at both the Council meetings and the committee meetings. Council members are invited and do participate with the MVR management staff to help develop the strategic plan and determine the agency's priorities.

The following is a summary of specific input and recommendations from the Council.

1. Invite a representative from the Office of the Commissioner of Higher Education to attend a Council meeting. If possible representatives from other education agencies such as the Office of Public Instruction (OPI) might also be invited to compose a panel. The panel could present on and lead discussion on a variety of topics, including, but not be limited to: standardization of eligibility requirements for disability support services within higher education; OPI's Performance Summary; update on state and national legislation impacting the transition of youth with disabilities from the public school system to post secondary options; and an overview of the interagency agreements involving MVR and education agencies.

MVR Response: MVR has been unsuccessful in having a representative from the Commissioner of Higher Education's Office attend a Council meeting. In the past, MVR has focused on inviting a specific person to attend a Council meeting. In the future, MVR will work with the

Commissioner's Office to schedule a representative who would be appropriate without seeking specific persons.

2. Create an array of methods, through professional development of MVR Counselors, to help them more effectively relate VR services to the Individualized Education Plan (IEP) process. Consider joint training with partners such as Parents Lets Unite for Kids (PLUK), OPI, Higher Education, PEPNet-West, OPI etc.

MVR Response: The MVR transitions coordinator was very involved with the planning of the 1st annual Montana Transitions Conference and several MVR counselors attended. Attendees also included representatives cited in this concern as well as a wide array of other organizations involved in transition of youth with disabilities. The 2nd annual Montana Transitions Conference is in the planning stages and will be held in collaboration with the Montana Association for Rehabilitation, which is the yearly conference that most MVR counselors attend. Therefore, the majority of counselors will likely have the opportunity to benefit from networking and training opportunities with many other agencies involved in transition activities in Montana. Also in the last year, the transitions coordinator and transitions counselor worked as part of a team to develop a Montana transitions website. The website was developed to provide a site that would be a portal to a wide array of resources related to transition. While the site includes national resources when appropriate, it focuses on Montana resources. The website includes blogs for Montana professionals from across disciplines to discuss issues related to transitions.

3. Maintain a 121 Fact Sheet with information that includes eligibility and service area guidelines for the six 121 Projects. Once completed, ensure that all MVR counselors receive a copy.

MVR Response: Each year MVR plans to send the current information on these issues to each of the 121 Projects active in the state. The information will be collected and updated information sent out to MVR counselors by June 15 of each year.

4. Maintain a Public Relations (PR) strategy. This strategy will include development of television and radios spots and other strategies to increase awareness of MVR, and MVR's efforts to recognize businesses that contribute to the hiring of Montanans with disabilities.

MVR Response: This is ongoing. The Council and MVR are developing public service announcements on MVR services and the announcements are nearing completion.

In April 2009, the Missoula Target store was presented with a plaque recognizing their contributions for hiring persons with disabilities. Television coverage was arranged for this event to increase public awareness. A second award will soon be presented to an employer in the Helena area.

5. Provide ongoing cultural sensitivity training to the MVR Council, including Native American and other cultures.

MVR Response: At the October 2008 Council meeting, Julia Doney, President of Fort Belknap Tribal Council gave a presentation on the background of tribal members and her own experiences.

At the May 2009 council meeting, a handout was distributed describing a web site that presents a cultural service matrix for professionals and others that assists with communication across cultures on mental health issues.

In August 2009, the MVR Council will hold a meeting on the Rocky Boy's Reservation.

MVR will explore avenues to provide cultural sensitivity training related to other cultures besides Native American culture.

6. Monitor the National Coalition of State Rehabilitation Councils (NCSRC) request to adopt a resolution supporting the organization.

MVR Response: The Montana VR Council continues to follow the activities of the NCSRC. Areas monitored are the philosophy of the organization on relationships with state VR agencies and the financial commitment involved.

7. MVR should maintain efforts to outreach to students with disabilities, parents, school staff, and community agencies on transition services.

MVR Response: MVR continues to improve its transitions services to youth with disabilities. MVR continues to maintain a "contact list" between the school system and MVR offices, which is available on our website. Every high school in Montana is assigned a MVR counselor liaison. MVR is currently reviewing this website to determine if there are changes that could make it more user friendly.

MVR supports the Montana Youth Leadership Forum in the following ways:

- Referring delegates to the program.
- Having a counselor from each region attend MYLF for one day.
- Making a presentation on MVR to all participants of MYLF.

MVR participates in a number of groups dedicated to the advancement of "transitions" services and is an active member of the Governor's Transitions Council.

MVR has created a transitions counselor position in the Missoula Region. This counselor schedules office hours at the high schools and is available to offer consultation to special education and 504 coordinators, teachers, school administration, parents, advocacy groups and others regarding the role of MVR in transition. The MVR transition counselor will meet with staff and other interested parties in other school districts to share best practices and facilitate communication between parties. During the past year, the transitions counselor has developed a number of materials to assist MVR and school personnel in their transition activities. The materials developed include a PowerPoint on MVR's role in the transition process, an article in the Transitions Project's E News on MVR's role in the transition process, a sample transitions agreement outlining the roles of MVR and school personnel, and a tool kit for MVR counselors working with youth in the transition process. The transitions counselor participated in a national webinar on transition. The transitions counselor has been an active participant in the Montana Youth Transitions project which developed the 1st annual Montana Transitions Conference and the transitions website described previously. The transitions counselor also is a member of the Governor's Transitions Council.

8. Support the Medicaid Infrastructure Grant (MIG), which will provide extended health care coverage to employed consumers.

MVR Response: The MIG assisted in the development of legislation supporting the Medicaid Buy-In that was passed by the 2009 Montana legislature and signed into law by the Governor. Peggy Williams of MVR central office is a member of the work group developing strategies for implementing the Medicaid Buy-In program

9. Continue outreach to urban Native Americans concentrating on areas not yet reached.

MVR Response: MVR staff has met with or is planning to meet with the following Native American Urban Centers to provide program and referral information, literature regarding MVR:

- Missoula Native American Center (this Center had not been met with the previous year)
- Great Falls Indian Family Health Center
- There are plans to arrange a meeting with the Helena Indian Alliance later this year

10. Increase the percentage of rehabilitated consumers who have health insurance at closure. As baseline, the 2006 percentage of rehabs with health insurance through their employment was 26.1%. The 2006 percentage of rehabs with any kind of health insurance (including Medicaid and Medicare) was 69.5%.

MVR Response: The following shows the data on this issue for the last three years.

Year/insurance coverage	2006	2007	2008
Employer insurance	26.1%	26.2%	25/3%
Any insurance including Medicaid or Medicare	69.5%	70.9%	72.5%

11. Improve Information flow between VR and the Department of Corrections to better serve the Department of Corrections population in need of VR Services.

MVR Response: To date, a liaison has been established in the Missoula region.

The Butte region has regular contact with various programs related to the Department of Corrections such as: Warm Spring Addiction Treatment and Change (WATCH) and Corrections Connections on the Warm Springs campus. Contact with Sanction Treatment Assessment Revocation & Transition (START) is anticipated before the end of the year. The Butte office also responds to any requests from the state prison, but has not received any requests recently.

The Great Falls office has a liaison with the NEXUS Methamphetamine Treatment Center in Lewistown, the Great Falls Transition Center, and the Cascade County Regional Detention Center.

12. Establish and maintain a good relationship with the new VR administrator.

MVR Response: On March 3, 2009, the Council chair wrote a letter to the director of the Department on Public Health and Human Services expressing the importance that the Council placed in filling the vacant position of administrator of the Disability Services Division and offering assistance in the hiring process for the position.

At this time, The Department of Health and Human Services is reviewing strategies for restructuring that could impact the Disabilities Services Division, and the administrator position. Recruitment and hiring for the administrator position will not begin until possible implications of the restructuring on the administrator position have been resolved.

13. MVR should hold a MVR Council meeting on a reservation on a yearly basis.

MVR Response: MVR has held a MVR Council meeting on a reservation on a regular basis in recent years. MVR will attempt to hold a meeting on a reservation on a yearly basis in the future.

Meeting minutes for the MVR council can be accessed at:

<http://www.dphhs.mt.gov/dsd/rehabilitationcouncil/index.shtml>

Cooperation and Coordination

4.8(b) (1) - Cooperative Agreements with Agencies Not Carrying Out Activities Under the Statewide Workforce Investment System

Cooperation, collaboration, and coordination with agencies not in the statewide workforce system are usually expressed through cooperative agreements or memorandums of understanding. MVR presently has agreements with the following entities:

- Montana's Section 121 Vocational Rehabilitation Projects
- Mental Health
- Developmental Disabilities Program
- Montana Small Business Development Centers (SBDC)
- The Commissioner of Higher Education
- Office of Public Instruction

Section 121 Vocational Rehabilitation Projects

MVR presently has cooperative agreements with six of the six Section 121 Vocational Rehabilitation Projects (Confederated Tribes of the Salish & Kootenai Reservation, Fort Belknap Reservation, Fort Peck Reservation, Rocky Boy's Reservation, Northern Cheyenne Reservation and the Blackfeet Reservation).

The purpose of these agreements is to establish procedures to assure continued coordination between the 121 Vocational Rehabilitation Projects and MVR. These agreements are implemented for the sole purpose of enhancing, to the greatest extent possible, the delivery of rehabilitation services to persons with disabilities living in the state of Montana and residing on or near the six reservations that currently have a Tribal Vocational Rehabilitation Project.

Mental Health

This cooperative agreement has provisions that include:

1. To make available the required supported employment/follow-along services from MVR's Community Rehabilitation Programs certified

- mental health providers. Follow-along services may be provided through Community Based Psychiatric Rehabilitation and Support, and through Case Management services.
2. To serve persons identified as eligible for mental health service under Medicaid or the Mental Health Service Plan.
 3. To strengthen supported employment services to Montana citizens eligible for vocational rehabilitation supported employment services and for community mental health services funded by the Addictive and Mental Disorders Division.
 4. To provide cross-training and technical assistance between our agencies.
 5. To establish and evaluate annual goals for our interagency work towards coordinated vocational and support services.

Developmental Disabilities Program

This Cooperative Agreement has provisions that include:

1. To strengthen supported employment services to Montana citizens eligible for vocational rehabilitation supported employment services and who receive services through the Developmental Disability (DD) provider organizations.
2. To contract with developmental disability provider organizations to provide adult sheltered and supported employment work services through funds made available to them from the State general fund and Medicaid home and community waiver.
3. To make available the required supported employment, extended/follow along services from MVR's Community Rehabilitation Program's enrolled DD providers. Long-term follow-along services are made available by DD provider organizations through a long-term sign off cooperative agreement with MVR. This sign off is between the provider organization and MVR. It is incumbent upon DD provider organizations to negotiate and secure any approving authority from the DDP. MVR agrees DD provider organizations will provide copies of the long-term follow-along sign off cooperative agreement documents to the DDP Regional Managers. The DD provider organization sign offs commits the provider to making available this service, but does not commit funds. In terms of funding source and availability, DDP resource commitments are made between DDP regional managers and provider organizations.

4. For those residing in the Montana Developmental Center (MDC) who have been identified as being in need of vocational/supported employment services, those needs must be included in the community placement plan. The costs for long-term follow-along need to be included in the resources allocated, and need to be made available to reimburse an enrolled provider for long-term follow-along services after discharge from MDC.

Montana Small Business Development Centers (SBDCs)

The purpose of this agreement is to establish guidelines and procedures to be used by the Montana Small Business Development Centers (SBDC) and the MVR Program in coordinating the services of both programs on behalf of individuals with disabilities who desire to pursue the goal of self-employment. This agreement outlines each party's role and responsibilities, referral procedures, information exchange methods, forms used, and implementation, evaluation, amendments and termination procedures.

Business Enterprise Program (BEP)

The Montana Business Enterprise program has three active and three unplaced vendors. No new consumers received training during the past year. The program expanded to include cafeterias in state buildings in addition to the one on a federal site. Legislation passed that allowed the Business Enterprise program to establish vending at rest stops along Montana interstates. Three additional cafeterias will become available next year.

Department of Agriculture

The Montana-Idaho AgrAbility and Farm Safety Project is part of a nationwide network of USDA-Extension Service Programs commonly known as AgrAbility. The project is a joint effort of the Extension Service and the Easter Seal Society, and Montana has offices at Montana State University-Bozeman and the Northern Rocky Mountain Easter Seal Society in Great Falls. MVR plans to contact the Montana Idaho AgrAbility program within the next year to see if there are ways we can collaborate.

State Use Contracting Programs

Montana state agencies may purchase supplies and services from sheltered workshops or work activity centers. Such purchases are exempt from competitive bidding laws and rules. The Montana Department of Administration maintains a list of certified sheltered workshops or work activity centers located in the state. The list includes the supplies and services provided by each sheltered workshop or work activity center.

Cooperation in Training Activities

MVR routinely collaborates with other organizations to provide training opportunities for MVR staff. The following is a list of collaborating organizations:

University of Montana - Rural Institute on Disabilities
Montana State University – Billings
Montana Center on Disabilities
TACE Programs
Utah State University
Montana Youth Leadership Program (MYLF)
Centers for Independent Living
Brain Injury Association of Montana
Client Assistance Program
Montana Addictive and Mental Disorders Division
Developmental Disabilities Program
Disability Determination Services
Social Security
Rocky Mountain Rehab
Fort Belknap Tribal Vocational Rehabilitation Program
Western Washington University
MAXIMUS – Ticket to Work Training

4.8(b) (2) - Coordination with Education Officials **Office of Public Instruction**

This cooperative agreement has provisions that include:

Memorandum of Understanding (MOU) MVR and the Office of Public Instruction

Purpose

The purpose of this Memorandum of Understanding is to enhance the working relationship between the above mentioned parties to provide more effective services to individuals with disabilities in compliance with the Individuals with Disabilities Education Act (IDEA), 20 U.S.C., 1485 and the Rehabilitation Act of 1973, 29 U.S.C. as amended. Within this agreement are strategies for the two agencies to work collaboratively in evaluating, serving and planning for a seamless transition from school for students eligible for Vocational Rehabilitation services (eligible students), as they make the transition from school to adult education, integrated employment (including supported employment), continuing and adult education, independent living and community participation.

Joint responsibility for Training:

The OPI and MVR shall jointly sponsor training for their respective staff members and Local Education Agency (LEA) personnel. The training shall focus on requirements of federal and state law concerning education of individuals with disabilities, their transition from school to employment, vocational rehabilitation services, assistive technology, and the substance of this MOU.

Responsibilities of the OPI:

- 1. Inform** – The OPI shall assist school districts to inform MVR of students with disabilities who are on an IEP and may be in need of services through MVR. The notice to MVR shall occur no later than six (6) months prior to the student's 16th birthday in order for MVR to participate in the future development of the student's IEP. For students enrolling closer to graduation or age twenty one (21), school

districts are urged to inform MVR as soon as those students are identified.

- 2. Necessary Lead Time – Eligibility Determinations** – For the First IEP meeting following the initial notice to MVR, the OPI shall encourage school districts to inform MVR of the meeting at least two months in advance to allow sufficient time for MVR to acquire the necessary diagnostic data to determine the student's VR eligibility. The notice to MVR should include an invitation to the MVR Counselor to participate, from then on, in transition planning within the IEP process.
- 3. Necessary Lead Time – IEP's** – For all IEP meetings subsequent to the first meeting I (i), the OPI shall encourage school districts to schedule IEP meetings for eligible students with disabilities one month in advance if at all possible, and to include notice to MVR and the invitation for the MVR Counselor to participate. Development of vocational goals and objectives shall occur in collaboration with the student, parents and appropriate professionals.
- 4. Referrals of Students with Disabilities not on an IEP** – The OPI shall assist local school districts with referrals of students with disabilities who are not on an IEP and may be in need of services through MVR. The notice to MVR should occur at least one year before their anticipated graduation dates.
- 5. Technical Assistance** - The OPI shall provide technical assistance to local school districts concerning the provision of free, appropriate, public education, including the responsibility to provide assistive technology to assist with the education of students approaching transition to independent living and employment as appropriate.
- 6. Monitoring Data for MVR** -The OPI shall provide to MVR the data it collects from school districts regarding the number of special education students they are serving. Data provided to MVR will only be transferred if the release of the data is consistent with the requirements of the Family Education Rights and Privacy Act (FERPA).

- 7. Related Services:** The OPI shall assist local school districts with coordination of vocationally related services with MVR for eligible students. Coordination should commence in the early stages of transition. Vocationally related service coordination and corresponding agency responsibilities should be identified in the IEP and included on the student's IPE when appropriate.
- 8. Outreach and Identification:** The OPI shall assist the local school districts with methods and procedures for outreach and identification of students and families in need of transition services. Assistance with the methods and procedures should include actions needed to engage those who are not aware of MVR services, including how the school districts identify and work with transition aged students who may be in alternative high schools or are incarcerated.

Responsibilities of MVR

- 1. Consultation –** The MVR Counselor shall assist school districts in planning for the transition of students with disabilities from school to post school activities. The MVR Counselor shall act as a consultant for the student, parents and the school district during IEP/transition meetings that are scheduled before MVR has an open case on the student. When requested by the local school district, MVR shall ensure that the MVR Counselors/staff participate in the evaluation process of students who have applied for MVR services, and in the development of the IEP's for eligible students.
- 2. Former Students -** MVR shall encourage former students who are still eligible for IDEA services to enroll again in school for further study and training to enhance their opportunities for employment. Such former students shall also be eligible for VR services customarily provided by MVR to adults over the age of 21.
- 3. Assistive Technology -** When required as part of the transitioning student's IPE, MVR will provide assistive technology services after the individual leaves the school district.
- 4. Related Services – (Vocational) After** the eligible individual leaves the local school district, MVR will continue to provide vocational services, i.e., vocational assessments, career exploration, job shadowing, vocational guidance and counseling and other required services as documented in the IPE.

- 5. Transition Coordinator** – MVR’s Transition Coordinator shall coordinate with Montana OPI Transitions Specialists to develop and promote a seamless transition system. MVR also has a full time Transition Counselor in the Missoula District who will schedule office hours at the high schools and will be available to offer consultation to special education and 504 coordinators, teachers, school administration, parents, advocacy groups and others regarding the role of MVR in transition. The MVR Transition Counselor shall meet with staff and other interested parties in other school districts as invited to share best practices and facilitate communication between the parties. MVR staff will also be available to provide information on changes in the law or MVR policy regarding transition services.

Financial Responsibilities

Local School Districts are financially responsible for the costs of services they are mandated to provide under the IDEA and MVR is responsible for costs of services it provides under the Rehabilitation Act. Should a service be necessary that neither party is mandated to provide, consultation will occur between the programs and services. Payment(s) will be based on the needs of the student, the availability of funds, and which agency is best positioned to provide the particular service at the time.

Dispute Resolution as to Financial Responsibilities between Local District and MVR

Should a service be necessary that neither the local school district nor MVR is mandated to provide or there is a dispute as to which entity is responsible to provide the service, consultation will occur between the entities. Services or payments will be based on the needs of the student, availability of funds, and which agency is best positioned to provide the particular service at the time. Should the Local School District and the MVR be unable to resolve the dispute after consultation with one another, the Dispute Resolution Procedures outlined in the Interagency Agreement between DPHHS and the OPI shall apply.

MOU Office of the Commissioner of Higher Education (OCHE)

The purpose of this memorandum of understanding (MOU) is to develop and adopt principles which will guide the planning and delivery of support services to individuals with disabilities who are mutual clients of MVR and students enrolled in the Montana University System (MUS).

This MOU has provisions which include:

1. MVR and the units of the MUS maintain different requirements for determination of eligibility, documentation of disability, and the provision of services or accommodations. This MOU does not require either MVR or MUS to alter its policies for providing services or supports, and this MOU is not to be used as a basis for determining eligibility for MVR or MUS services.
2. The units of the MUS through the guidance of the OCHE are required to provide services and accommodations to MVR clients to the same extent as they are provided to other students with disabilities, in accordance with Montana state law, the Americans with Disabilities Act of 1990 (PL 101-336) and Section 504 of the Rehabilitation Act (PL 93-112, as amended).
3. MVR is not prohibited in this agreement from contracting with units of the MUS to provide services or support for MVR clients beyond those required to assure equal access to equal educational opportunities.
4. The MOU will provide both parties with the opportunity to enhance communication and the exchange of information regarding services offered by MVR and the various campuses of the MUS.
5. MVR and the units of the MUS will work together to enhance cross-referrals of individuals with disabilities, as appropriate to each individual's needs. Personal information about the

individual will not be shared without an appropriate release of information.

6. The MUS will not require students who have a disability to apply for MVR funding before providing services or support. For students who have applied for MVR services, the MUS will not deny or delay the provision of services or support while MVR is in the process of determining eligibility for services.
7. MVR services are provided pursuant to an individualized plan for employment (IPE) which is developed jointly by the rehabilitation counselor and the eligible individual. In those situations where referral has been made to campus disability support services, the appropriate disability services staff may also be involved in helping to develop the IPE.
8. The MVR rehabilitation counselor and the MUS campus disability support services staff will respect the individual's right and responsibility to fully participate in all decisions regarding his or her vocational future. The IPE shall be developed and implemented in a manner that allows the individual an opportunity to exercise informed choice in selecting an employment outcome, the specific vocational rehabilitation services that are to be provided, the entity that will provide those services, and the methods that will be used to procure the vocational rehabilitation services.
9. MVR clients who attend a unit of the MUS may need reasonable accommodation, including auxiliary aids or services in order to have equal access to the programs and services offered at that particular institution.
10. The provision and cost of reasonable accommodations are the responsibility of the particular unit of the MUS. For individuals with disabilities who are mutual clients of MVR and students at a unit of MUS, and are otherwise qualified for such aids or services, the funding source for auxiliary aids and services will be determined on an individual case-by-case basis.

11. Additional guidelines relative to interpreter services for eligible clients/students:

- A. The MUS unit will be responsible for procuring and paying interpreters. MVR will reimburse for its share of the cost.
- B. The MUS unit will provide the appropriate MVR office with an estimate of the number of hours and cost of interpreter services which will be billed to MVR prior to the start of services.
- C. The MVR office must authorize payment for the interpreter services prior to the start of services.
- D. MVR and the MUS unit will require full compliance with the Registry of interpreters for the Deaf (RID) Code of Professional Conduct.

4.8(b)(3) - Cooperative Agreements with Private Non-profit Vocational Rehabilitation Providers.

The designated state unit does not have formal cooperative agreements with our private non-profit providers of vocational rehabilitation services in Montana. Rather, MVR operates on a purchase-of-service basis and we have identified private non-profit rehabilitation providers who meet qualification standards established by the designated state unit and who provide services on a purchase-of-service basis to our clients.

We meet with this provider group regularly to talk about fee structures, services provided, and to discuss outcome measurements and consumer satisfaction for each of these entities. Because these are individualized purchase-of-services, there is no formal cooperative agreement.

The majority of services purchased by MVR from Community Rehabilitation Programs (CRP) are directly from the vocational rehabilitation counselor utilizing an authorization process. The amount of services purchased depends upon the amount and type of services needed by a consumer. Agencies eligible to receive authorizations must be approved vendors and must be current service providers of the Department or have CARF Accreditation. In a limited number of cases individuals with appropriate backgrounds are authorized to provide

services in remote rural areas where a Department or CARF provider is available.

MVR revised the fee structure for our CRP's. The new fee structure was implemented July 2008. MVR will no longer utilize the audit-based, cost reimbursement system at that time.

4.8(b)(4) - Evidence of Collaboration Regarding Supported Employment Services and Extended Support Services.

In Montana, supported employment is for individuals with the most significant disabilities who require support services (job finding, job placement and job coaching) geared to help the individual secure competitive employment in an integrated employment setting. MVR works closely with state agencies and other organizations with regard to providing supported employment and extended support services for individuals with the most significant disabilities.

Mental Health: MVR has a negotiated cooperative agreement with the Addictive & Mental Disorders Division. The cooperative agreement provides for: cross-training and technical assistance between our agencies, establishment and evaluation of annual goals for interagency work towards coordinated vocational and support services, and to make available the required supported employment/ extended support / follow-along services from MVR's Community Rehabilitation Programs certified mental health providers.

Developmental Disabilities Program: MVR has had a long and productive relationship with the Developmental Disabilities Program (DDP), and that program continues to sign off for extended support services for persons with significant disabilities. MVR and DDP are located in the same division, and communication between the two programs is excellent. The cooperative agreement provides for: cross-training and technical assistance between our agencies to make available the required supported employment, extended/follow along services from MVR's Community Rehabilitation Programs enrolled DD providers, and for DDP to be responsible for contracting with developmental disability provider organizations to provide adult supported employment work services through funds made available to them from the state general fund and the Medicaid home and community waiver.

State Certified Community Rehabilitation programs: MVR works with a number of community based organizations across the state. Eighteen of these organizations are certified as extended support service providers to assure quality in service delivery for our consumers. MVR has certified programs in the mental health arena as well as the developmental disabilities arena to provide these services at the local level. MVR works with the Community Medical Center WORC Center to provide extended services to persons who suffer from traumatic brain injury.

Extended Support Services: The extended support service program is the state of Montana's funding source that makes long-term support services available to individuals as they work in either a sheltered or community-based employment setting. The extended support service program is administered and managed by Rocky Mountain Rehab, p.c. (RMR) of Billings, Montana through a contract with the Department of Public Health and Human Services, Disability Services Division.

Attachment 4.10

Procedures and Activities Regarding the Establishment and Maintenance of a Comprehensive System of Personnel Development

Data System

Comprehensive System for Personnel Development (CSPD) information is contained in the Montana Vocational Rehabilitation (MVR) CSPD database. This database manages information on training offered throughout the year. Information can be sorted by staff person, training event, or CRC number.

Data from the federal RSA-2 shows that the number of person-years for VR staff has decreased over the past five years. This is because of state-imposed vacancy savings. The chart below shows the distribution of personnel (using the RSA-2 definition) over the years:

Montana VR Staffing by Type of Staff (data from RSA2)					
	2004	2005	2006	2007	2008
Administrative	6	7	5	6	6
Counselor	39	37	37	37	38
Staff supporting counselor activities	41	40	40	40	41
Other	0	0	0	0	0
Total Staff	86	84	82	83	85

Looking at budgeted personnel, MVR employs 38.4 FTE counselors, 4 rehabilitation teachers, 4 orientation and mobility instructors, and 5 regional administrators. These are the only staff that require certification or a CSPD plan leading to certification. In FY 2008, MVR served 7,453 Montanans with disabilities, which means that each counselor FTE served 182 consumers. The population in western Montana continues to grow, while the population in eastern Montana decreases.

Unfortunately, there is not a “pocket” where the decline is large enough to take away a counselor. Montana has such large travel distances for counselors to meet with consumers that this is not possible. During the 2007 Legislature, Montana VR received an additional counselor position to work specifically with transition age youth in western Montana. This position is a “hybrid” which spends approximately half time with counseling duties and half time with program officer duties. We expect that the new counselor will relieve some of the large caseloads in Missoula, but the area is still growing, and the caseloads will continue to increase.

When all the positions are filled, MVR has enough staff to provide vocational rehabilitation services to the state.

In the next 5 years, Montana VR will continue to investigate the feasibility of increased counselor staffing to meet the transitions needs of Montana's youth with disabilities. MVR would like to see a transitions counselor in each of its four regional offices. In addition, in the next five years, Missoula will need another counselor. Of course, population growth and client demographics will be closely monitored. If our counseling staff increases, it would be likely that additional support staff would also be necessary. Also, Montana VR is experiencing significant turnover in upper management positions, including the state director, chief of field services. Montana VR has been anticipating this turnover and is addressing it through the Futures program, which is discussed elsewhere in this plan. This will create a need for hiring more counselors as employees are promoted through the system. In addition, normal staff turnover means that new staff will need to be hired each year.

Recruitment and Retention

MVR continues to review, on a yearly basis, the reported training needs of its entire staff. This is part of our overall maintenance of the Comprehensive System for Personnel Development. Of particular concern to MVR is the implementation of a system of personnel development that will ensure an adequate supply of qualified rehabilitation personnel for the designated state unit. Montana's Vocational Rehabilitation Council has had an opportunity to review and make comments on the development of the plans and policies regarding qualified personnel.

Currently Montana has identified 95.8%, of its professional counseling and supervisory staff as Certified Rehabilitation Counselors (CRC), qualified to sit for the CRC, or under a CSPD Plan. At this time there are nine counselors pursuing the requirements necessary to qualify to sit for the CRC examination, and 2 already prepared to take the examination in the Fall of 2009.

Montana's personnel policy has been rewritten so applicants who have achieved the CRC status receive a higher priority for hiring than those without it. In addition, Montana vigorously recruits for master's level degrees in rehabilitation counseling when there are vacancies. MVR has a

good working relationship with the Rehabilitation Counseling Graduate Programs at Montana State University – Billings and Utah State University. Both of these institutions have sought input from MVR related to curriculum development and how best to prepare students to work in the public VR program. MVR has successfully recruited and hired graduates of these two programs, who were well prepared to sit for the CRC examination.

MVR also tracks the current enrollment of MVR staff in the following educational programs: Master's Degree in Rehabilitation Counseling through the Distance Education Program at Utah State University (USU) in Logan, Utah (five staff), and the Master's Degree in Rehabilitation Counseling Program at Montana State University (MSU) in Billings, Montana. USU graduates 25 to 30 individuals per year in their vocational rehabilitation masters program, and MSU-Billings graduates 10 to 12 individuals per year in their rehabilitation counseling program. At this time we also have three staff applying to Virginia Commonwealth University, which will be a new experience for this agency.

Turnover of rehabilitation counselors in Montana has been manageable. The agency continues to have qualified professionals applying for rehabilitation counselor positions – especially in our larger cities. MVR will continue to recruit the highest quality staff available. MVR projects turnover will remain constant, with some difficulty recruiting master's level rehabilitation counselors in some regions of the state. Individuals coming to MVR without a Master's Degree in Rehabilitation Counseling will be hired on the condition that they will develop a CSPD Plan to meet the standard.

Through the extensive efforts of the Blind and Low Vision Services staff and the personnel staff within the department, MVR has been able to attract candidates from across the country for Rehabilitation Teachers and Orientation and Mobility Specialists.

Montana has no state university training for either Rehabilitation Teaching or Orientation and Mobility, and therefore, attracting highly qualified professionals in these areas will continue to be a problem for MVR. In an effort to address this dilemma, training positions have been developed. MVR maintains contact with Montana State University-Billings to update them on the MVR Program. The agency gathers information on degree requirements, and work with rehabilitation counseling instructors to ensure that university requirements are compatible with those needed to qualify

counselors to effectively and efficiently serve people with significant disabilities who are eligible for vocational rehabilitation services. MVR works with Montana colleges to recruit individuals from minority backgrounds and persons with significant disabilities. MVR takes affirmative action to employ and advance in employment, qualified individuals with significant disabilities.

In Montana, Native Americans make up the largest minority population. Montana has six Native American Section 121 Projects housed on reservations and employing Native Americans as rehabilitation counselors. However, with the new CSPD standard requiring education at the graduate level, the general MVR program has difficulty recruiting qualified Native Americans for employment within the agency. The one tribal college program, providing a Bachelor's Degree in Rehabilitation, has been discontinued and MVR lost that program as a resource for potential employees.

By developing a plan to assure adequate numbers of CRC counselors and by providing leadership training at all levels, MVR is working to develop future leaders who will be ready to take over key positions as they are vacated. Towards this effort, MVR has formed a leadership council that will work directly with current MVR management staff in the design and implementation of the process and format for case services to consumers. Staff participating on this leadership council, referred to as the MVR Futures Group, will provide the skills necessary to take MVR into the future.

MVR Futures is composed of current staff who have been successfully employed by the agency for a minimum of two years, have completed specific prerequisite training in supervision and/or management and who are or have been, enrolled in approved leadership training, as finances allow.

Participation in the MVR Futures Group involves a competitive application process and involves a three-year term for staff members and two-year term for the regional administrator. Successful completion of a three-year term in the MVR Futures Group has a proposed equivalency of two years of management experience within MVR. Allowing staff to participate in real-life problem solving and real-life improvements to our current service delivery system serves the agency well and provides a mechanism for honing the skills of future leaders within the agency.

MVR also works closely with TACE programs to provide in-service training to our staff. Presently, staff members are taking advantage of regularly offered videoconference training on a variety of pertinent topics.

Personnel Standards

MVR has a system for ensuring the yearly evaluation (annual review of each counselor's CSPD status to arrive at the percentage of "qualified" staff) and performance of each staff member. The performance evaluation of rehabilitation counselors and other professionals is paramount to our efforts to ensure quality services to Montanans with disabilities. Our evaluations are tied to specific performance activities leading to those quality services.

The standard for counseling staff in Montana is to qualify to sit for the Certified Rehabilitation Counselor examination or to have qualified to sit in the past, with the completion of additional coursework---and then to complete such coursework. Initially, MVR had targeted 2007 as the year in which we would meet our CSPD goal of having all counselors meet the standard of qualifying to sit for the CRCC examination. Unfortunately, as more experienced employees retire there is not a ready pool of qualified professionals to hire into those vacated positions. In "difficult to recruit for positions" MVR will hire individuals with a Bachelor's Degree in a related field (at the minimum) and develop a CSPD plan to ensure that the employee moves toward qualifying to sit for the CRC examination. It typically takes an individual hired with a Bachelor's Degree three years to meet the standard. Blind and Low Vision Services instructional staff must be eligible to hold certification from the Academy for Certification of Vision Rehabilitation and Education Professionals.

Montana has identified eight to nine rehabilitation counselors who need graduate level training to qualify to sit for the Certified Rehabilitation Counselor examination. Currently, five are enrolled in Utah State University and three are preparing to enter Virginia Commonwealth University within six to twelve months. MVR anticipates that the distance education graduate programs will take the average rehabilitation counselor approximately two to three years to complete. Without the distance-learning component, MVR would be unable to set this plan in motion, as this allows for the counselor to complete their graduate education while remaining on the job. Through continued use of the distance education programs, MVR anticipates maintaining/increasing the numbers of Certified Rehabilitation

Counselors over the next several years. MVR counselors have completed a graduate program in Rehabilitation Counseling at an average rate of 3 per year. This has been the trend for at least the last eight years. Two counselors completed their plans this year and will be taking the CRC exam in the Fall of 2009.

CSPD requirements dictate master's level coursework. CSPD funds are also written into the current in-service training grant; however, Rehabilitation Services Administration scholarships are utilized whenever available to the graduate student. MVR's comprehensive efforts to meet the training needs of staff provide significant benefit in terms of recruitment of new staff and retention of existing staff.

One counselor is eligible for retirement and one has experienced a decrease in duties.

Communication with Diverse Populations

MVR requires that rehabilitation counselors who are hired to work with deaf and hard of hearing consumers have fluent sign language skills. Sign language interpreters for the deaf or hard of hearing are also provided when necessary. Other accommodations, such as documentation in alternative formats, are routinely made by MVR. MVR policy is to consult with the consumer to determine the most appropriate mode of communication.

Montana has a relay system for telephone communication with consumers who are deaf or hard of hearing and offices are equipped with TTYs. Three offices (with the highest numbers of deaf/hard of hearing clients) have video phones for enhanced communication. The Montana Telecommunications Access Program is housed in the Department and lends tremendous technical support to MVR working with sensory impaired consumers. The agency has also developed a full time Assistive Technology Specialist position. The Deaf Center is operational and provides interpreter referrals and other services to persons who are deaf or hard of hearing. MVR purchases interpreter services from the Deaf Center.

Staff Development

MVR does complete training needs assessment on all employees each year. MVR identifies, through this process, major themes for training large groups

as well as individualized training topics identified by staff and their supervisors. This assessment provides for a comprehensive set of training topics that remain fluid as emerging priorities are developed either at the national level or within the state. It is also used to provide information for conference planning purposes to associations such as the Montana Association for Rehabilitation and the Association for Education and Rehabilitation of the Blind and Visually Impaired.

The MVR Human Resource Development Specialist has responsibility for in-service training, the preparation of Montana's in-service training grant, and for overall coordination of the agency's Comprehensive System for Personnel Development. MVR also completes CSPD assessments on all counselors in a plan to meet the standard. Each year, staff who do not meet the standard are counseled and their annual course of action is determined and documented. Of course, the purpose of this annual review is to continue to move counselors toward meeting the standard. Once counselors meet the standard by qualifying to sit for the CRC examination they receive a 3% pay raise, with an additional 3% upon successful completion of the CRC exam.

MVR places a heavy emphasis on leadership at all levels and continuous improvement of staff skills at all levels. Leadership and succession planning training are available to all staff in one form or another. MVR currently utilizes the Emerging Leaders Series through the Center for Continuing Education in Rehabilitation at Western Washington University and the department leadership program for staff development. Building on the formalized leadership/management training available to staff through the aforementioned programs, MVR helps future leaders hone their skills through participation in the MVR Futures Group. Additionally, there is emphasis on training in the areas of rehabilitation technology, informed choice, cultural diversity, current rehabilitation trends and disability information, and the Rehabilitation Act with its amendments. Training on topics such as rehabilitation technology, assessment, vocational counseling, and job placement is held at annual meetings such as All Staff, Bi-District, and Montana Association for Rehabilitation conference in addition to on-line seminars (for example through the TACE). Often a representative of the agency is sent to out-of-state training to bring back and disseminate significant knowledge from research and other sources.

Coordination of the CSPD and IDEA

The MVR Comprehensive System of Personnel Development coordinates with the requirements of the CSPD under the Individuals with Disabilities Education Act in that both necessitate the following.

1. A description of the procedures and activities that the State of Montana will take to ensure an adequate supply of qualified personnel.
2. A system for determining, on an annual basis:

The number and type of personnel needed,

which institutions of higher education in the state are preparing vocational rehabilitation personnel, the number of students enrolled in the programs, the number who graduate with credentials to qualify for employment with the agency, and

When to recruit, prepare, and retain qualified personnel, including personnel from minority backgrounds, and personnel with significant disabilities.

3. In-service training of all personnel:

Detailed in-service training procedures to ensure that all personnel have access to training resources to enhance their professional skills, ultimately improving service delivery to consumers.

The new transition counselor will explore ways of coordinating training between MVR, OPI, and the schools. Across the state, there are a number of transition fairs that are held annually at the high schools. MVR presents at the transition fairs, and provides information regarding MVR services and how to access those services.

Attachment 4.11

Assessments; Estimates; Goals and Priorities; Strategies; and Progress Reports

- (a) Results of Comprehensive Needs Assessment and Need to Establish, Develop, or Improve Community Rehabilitation Programs
- (b) Annual Estimates of Individual's to be Served and Costs of Services
- c)(1) State Goals and Priorities
- (c)(4) Goals and Plans for Distribution of Title VI, Part B Funds
- (e)(2) Evaluation and Report of Progress in Achieving Identified Goals and Priorities and Use of Title I Funds for Innovation and Expansion Activities.

ATTACHMENT 4.11(a)

Results of Comprehensive Needs Assessment and Need to Establish, Develop, or Improve Community Rehabilitation Programs

The Rehabilitation Act, as amended in 1998, requires each state to conduct a Needs Assessment every three years. Our current three year Needs Assessment, is a statewide assessment, jointly conducted by Montana Vocational Rehabilitation (MVR) and the State Rehabilitation Council (Council). This assessment examines the need to establish develop or improve community rehabilitation programs, and the rehabilitation needs of individuals with disabilities, particularly the vocational rehabilitation needs of:

1. Individuals with the most significant disabilities including their needs for supported employment services;
2. Individuals who are minorities and individuals with disabilities who have not been served or are underserved by the vocational rehabilitation program;
3. Individuals with disabilities served through other components of the statewide workforce investment system;

Three types of input were analyzed:

1. Direct inputs such as the consumer satisfaction survey, MVR counselor survey, focus forums (small regional groups of consumers), and the public hearing
2. Other indicators such as the Client Assistance Program report of needs, MVR Council input, program evaluation tools (standards and indicators, federal annual report, demographic trends), and our current strategic plan summary
3. Priorities from other programs such as the federal priorities, federal draft strategic plan, Developmental Disabilities “Planning Across Montana” priorities, and legislative priorities.

Method

The assessment took place between May 16, 2006 and May 31, 2007.

As indicated above, the assessment sought information from a number of sources. MVR consumer focus forums were conducted in Billings, Butte, Great Falls, Helena, and Miles City. In total, 38 people attended the focus forums. A mail survey was sent to 1,487 MVR consumers. The survey yielded a 22 percent response rate. The Public Hearing was held statewide on March 28, 2007, with Met Net sites in Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, Miles City and Missoula. 64 individuals attended the hearing and 12 written comments were received. MVR counselors were surveyed in May 2007 to gather input on their perceived needs of the consumers that they serve. 37 surveys were completed. Six 121 Tribal Vocational Rehabilitation Projects were surveyed, and MVR received responses from three of the Project Directors.

MVR and the Council met on October 12, 2006 to look at long range needs, and to begin development of the State Plan. MVR management staff, Council representatives, the Statewide Independent Living Council chair, and the Client Assistance Program representative met again in May 2007 to discuss the results of the Comprehensive Needs Assessment, and to make recommendations regarding FY 2008 goals and priorities.

Needs of individuals with disabilities who have the most significant disabilities, including their need for supported employment services.

“Individual with a most significant disability” means an individual with a disability who meets the criteria for having a significant disability and *in addition* has serious limitations in two or more functional capacities (such as, but not limited to, mobility, communication, self-care, self-direction, interpersonal skills, work tolerance, or work skills) in terms of employment outcome.

Findings of the comprehensive statewide needs assessment for individuals with the most significant disabilities include:

Assistance with Social Security work incentives and protection of current SSI/SSDI benefits

The need to increase earnings

Better transportation services

Contact with mental health centers and promotion of supported employment services

Expansion of services in rural areas

The need to reduce the extended support services waiting list for supported employment.

Improve quality of jobs and increase opportunities for state and federal positions

Assistance at the high school level with independent living and social skills

More job training program vs. working with job coaches

Individuals with disabilities who are minorities and individuals with disabilities who have been unserved or underserved

According to census data (Table 3: Annual Estimates of the Population by Sex, Race, and Hispanic or Latino Origin for Montana: April 1, 2000 to July 1, 2006---SC-EST2006-03-30---release date May 1, 2007), 90.8% of Montana's population is white and 7.5% is Native American or a combination of Native American and another race. Other minorities make up the remaining 1.7% of the population. Montana has six Section 121 Native American VR projects, covering six of its seven Reservations. Although most Native Americans on or near the Reservation prefer to be served by their Section 121, some are served by MVR or by both MVR and the Section 121. Last year, MVR served 1058 minority consumers (13.6% of the caseload); of which 585 were Native American and 374 were of two or more races.

Montana's population grew 4.7% between April 2000 and July 2006. Large growths, percentage-wise, occurred in African Americans (45.5%), Asian (18.6%), and "two or more races" (14.7%). However, number-wise, these increases accounted for less than 3,500 people out of a total increase of 42,000 people.

Native Americans

Over 60% of Montana's Native Americans live on Reservations. Many more live just outside the Reservation. However, Montana does have a number of Urban Indian Centers (Billings, Butte, Helena, Missoula, Great Falls), and during FY 2008, MVR will determine if Montana's Native Americans are unserved or underserved (see Attachment 4.11(d)goal # 1 C).

All six Native American 121 Programs were asked for input on what they perceive the needs are on their respective Reservations. In addition, the Council's Native American committee provides feedback throughout the year. Issues identified are:

- Creation of service programs for transition age youth into academic training or employment opportunities, or any other service
- Better collaboration between the area MVR offices and the 121 Programs
- Have an individual trained well enough in Social Security Administration policies to help Indians on Reservations apply for SSI and/or SSDI, and to assist with Social Security Work Incentives
- Establish a consultation policy which will secure the Tribe's input

Persons with Mental Disabilities including Severe and Persistent Mental Illness

Over the past 20 years, the disability makeup of Montana's caseload has significantly changed. In 1986, 69% of the consumers had physical disabilities, 19% had mental disabilities, and 12% had sensory disabilities. In 2006, 43% of the consumers had physical disabilities, 48% had mental disabilities, and 9% had sensory disabilities. The number of cases with mental disabilities has significantly increased, especially in areas like severe and persistent mental illness, learning disabilities and attention deficit hyperactivity disorder. One of MVR's goals is to determine the groups that are served or underserved (see Attachment 4.11(c) (1) goal # 1).

Findings of the comprehensive statewide needs assessment for individuals with mental disabilities including severe and persistent mental illness include:

The need for more Mental Health Centers to provide job placement and supported employment services

The need for information on how work will impact SSI/SSDI benefits

More information regarding Social Security Work Incentives

Improved transportation options

More vigorous outreach to the state hospital and mental health centers

Better communication between MVR and the Addictive and Mental Disorders Division

Lack of availability of community supports

The need for ongoing support (e.g., long term job coaching)

Individuals with disabilities served through other components of the statewide workforce investment system.

IN FY 2007, MVR identified the following goal and priority: “Participate in workforce investment activities to promote integration of services in order to optimize client service in an efficient manner.” Please refer to 4.11(e) (2) page five for MVR’s response.

Management staff, VR Council representatives, the Statewide Independent Living Council chair, and the Client Assistance Program representative met in May 2007 to discuss these inputs. The group then determined the highest priority needs which are listed below in order of importance:

Transitions

MVR needs to offer more and better services to students transitioning from school.

The following issues were identified:

Lack of soft skills, work experience when students graduate

Clear benefit strategy

Kids with physical disabilities are being missed

Urban and rural

From school to work

Reservations and rural

Job experience and opportunities

Need for students to receive information about VR services in a timely way

Education and awareness of VR services

MVR needs to publicize its services so that everyone who needs services is aware of what is available.

The following audiences were identified:

Consumers

Public

Sensitivity to mental illness issues

Within the agency

Other agencies

Reservations

Employers

Transportation

People with disabilities need transportation services, including on Reservations.

Loss of medical benefits for consumers going to work

Many people with disabilities cannot work because they will lose insurance coverage (Medicaid).

The following issues were identified:

Does Medicaid Buy-In money exist?

Complexity of Medicaid

More visibility for benefit planners and how to access them

Qualified and trained staff

MVR needs qualified and trained staff to provide the best services to consumers.

The following issues were identified:

Ongoing

Good wages

Knowledge of career opportunities

Skill to communicate with employers

Skill to communicate with consumers in conflict with VR policy

Recruitment

Knowledge based

Too few counselors

Too high caseloads

Too low compensation

Too high turnover

The results from the state wide needs assessment have been analyzed and goals and priorities are addressed in attachment 4.11(c) (1).

Assessment of need to establish, develop, or improve community rehabilitation programs within the state.

MVR continually assesses the need to establish, develop and improve Community Rehabilitation Programs (CRP) utilizing all of the methods described throughout attachment 4.11 (a). Among the need areas being addressed at this time include:

1. Expansion of services to rural and remote areas by the continued certification of private providers who meet MVR qualification levels for job placement and job coaching services
2. Expansion of Mental Health providers as CRP's to serve those with severe and persistent mental illness

Attachment 4.11 (b)

Annual Estimates of Individuals to be Served and the Cost of Services

During Federal Fiscal Year 2008, Montana Vocational Rehabilitation (MVR) estimates the following number of individuals will be served and the estimated cost of services:

- Estimated number of people with disabilities in Montana between the ages of 16 to 64 is 85,337 (2000 census).
- Title I Vocational Rehabilitation – It is estimated that a total of 7,400 consumers will be served at a case cost of around \$9.1 million (including Social Security). 900 consumers will be employed.
- Title VI-B funds – It is estimated that a total of 185 consumers will receive supported employment services at a case cost of around \$375,000. It is estimated that there will be 70 supported employment consumers employed.

Attachment 4.11(c)(1) State Goals and Priorities

Montana Vocational Rehabilitation's (MVR) mission is **“Promoting work and independence for Montanans with disabilities”**. To accomplish this mission, MVR and the Montana Vocational Rehabilitation Council (Council) have developed the goals and priorities, which are listed below. These goals are not in any order of priority.

As stated in 4.11(a), MVR and the Council met on October 12, 2006 to look at long range needs, and to begin development of the State Plan. MVR management staff, Council representatives, the Statewide Independent Living Council chair, and the Client Assistance Program representative met again in May 2007 to discuss the results of the Comprehensive Needs Assessment, and to make recommendations regarding FY 2008 goals and priorities.

- 1. Successfully assist eligible consumers with disabilities to achieve their employment goals.**
- 2. Assure consistent, high quality transition services are made available statewide.**
- 3. Build awareness and understanding of VR services.**
- 4. Develop opportunities for better jobs and on-the-job supports for people who are working.**
- 5. Enhance VR services specifically for people with mental illness, brain injuries, and learning disorders.**
- 6. Collaborate with other appropriate agencies and 121s to enhance outcomes for consumers.**
- 7. Continue attention to in-service training and meeting CSPD qualifications.**
- 8. Expand our staff recruitment effort.**

Attachment 4.11 (c)(4)

Goals and Plans for Distribution of Title VI Part B Funds

Supported employment services are provided on a statewide basis through the Title VI, Part B funds. Supported employment is competitive employment or employment in integrated work settings in which individuals are working toward competitive work, with ongoing support services for individuals with the most significant disabilities for whom competitive employment has not traditionally occurred or for whom competitive employment has been interrupted or intermittent as a result of a significant disability. Supported employment includes transitional employment for individuals with the most severe disabilities due to mental illness. Fund allocation on a statewide basis ensures an equitable statewide service delivery.

The goal of the state's supported employment program is to maintain a system whereby individuals with the most significant disabilities are afforded the opportunity to participate in integrated competitive employment.

Title VI, Part B funds will be distributed through four MVR regional budgets. Rehabilitation counselors at the local level will authorize Supported Employment services as needed from the Community Rehabilitation Programs statewide. MVR estimates that approximately \$375,000.00 will be expended on Supported Employment services in FY 2009. Funding sources include: \$300,000 in Title VI, Part B funds, supplemented with approximately \$75,000 in Title 1 (Section 110) funds. It is estimated that a total of 185 consumers will receive supported employment services at a case cost of around \$375,000. It is estimated that there will be 70 supported employment consumers employed.

Supported employment services are available statewide.

Strategies:

Inventory methods of supporting consumers on the job following supported employment outcomes

- A. Extended Employment – Rocky Mountain Rehab
- B. Mental Health cooperative agreement
- C. Developmental Disabilities cooperative agreement
- D. Private pay to CRP (CRP is signoff)
- E. Natural supports
- F. Medicaid waiver program
- G. In 2009, the Missoula region has began looking at using Employment Related Work Experiences as a method to support consumers on the job following supported employment outcomes.

Expand resources for extended support services by asking the Legislature for more funding: MVR will request more money for extended support funding during the EPP process.

Expand the number of mental health providers as CRPs to serve those with severe and persistent mental illness. There are currently six mental health providers that provide supported employment services. In the Great Falls region, the mental health center in Havre is now providing supported employment and placement services. The Missoula region has contacted mental health providers in Libby and Kalispell, but at this time they have not become providers for MVR. This goal will be ongoing, state-wide.

Attachment 4.11 (d)

State's Strategies and Use of Title I Funds for Innovation and Expansion Activities

Use of Title I Funds for Innovation and Expansion:

The Deaf Center and Transportation activities are functioning on their own income capabilities, or using other grant dollars. Innovation and Expansion dollars were provided to these programs on time-limited bases, which was enough to help them get started and move to their own independence. Title I funds are still used for the Statewide Independent Living Council and Montana Vocational Rehabilitation Council members to attend their respective four Council meetings during the year. Once funded by innovation and expansion funds, the Business Enterprise Program now receives some Title 1 funds to assist with meeting operational costs.

Strategies for responding to the need to expand CRP services and providers include:

1. Formation of the CRP Liaison group – this group meets quarterly via conference call to discuss CRP issues. The group is composed of MVR regional administrators, the MVR CRP state liaison, and MVR CRP regional liaisons. In the past year, the group has worked on streamlining services state-wide. The MVR CRP liaisons meet with the CRP's in their region at least quarterly to review the CRP Data Report, provide training if needed, and to keep abreast of possible issues that may be “percolating” in their region.
2. Formation of the CRP Rates Committee – this group is composed of MVR regional administrators, MVR CRP regional liaisons, MVR CRP state liaison, MVR Futures representative and two CRP's. MVR is in the process of revising the entire rate structure for employment services.

Address Needs Identified in the Comprehensive Assessment and to Achieve Identified Goals and Priorities

In May 2007 MVR management staff met with representatives of the MVR Council to discuss comprehensive needs and priorities for the upcoming year. The group looks at formal input from public hearings, focus forums, MVR staff, consumer satisfaction survey, Client Assistance Program, VR Council, state and national sources (CSAVR, RSA policy changes, Legislative activities, umbrella agency activities), and other surveys. Information from this meeting is used to plan for the next year and for the legislature.

MVR and the Montana Vocational Rehabilitation Council (Council) have developed the goals and priorities, which are listed below. These goals are not in any order of priority

A. Successfully assist eligible consumers with disabilities to achieve their employment goals.

Strategies:

- A. Continue to meet the standards and indicators, our federal report card.
- B. Continue achieving high consumer satisfaction feedback by meeting or exceeding 85% on consumer survey question #10 “In an overall general sense, how satisfied are you with the services you received?”
- C. Refine our methods to identify unserved and underserved populations and how to serve them. Evaluate methods over the next three years on developing ways to measure unserved and underserved.
- D. Make available a list of qualified Social Security benefits planners.
- E. Offer referral to benefit planners (CWICs) at intake to new SSI and SSDI clients.
- F. Increase the percentage of rehabilitated consumers who have health insurance at closure. The 2006 percentage of rehabs with health insurance through their employment was 26.1%. The 2006 percentage of

rehab with any kind of health insurance (including Medicaid and Medicare) was 69.5%.

- G. Have CRP liaisons find out from placement specialists what the need, availability and use of soft skills training is in their region. Also have the workforce liaisons investigate this.
- H. Train consumers in transportation options by asking the independent living centers to present travel training at each regional office every two years.
- I. Provide more access regarding new and emerging technologies by providing training at statewide events such as the annual All Staff meeting. Sources of training could be PLUK and the Rural Institute.

2. Assure consistent, high quality transition services are made available statewide

Strategies:

- A. Continue identifying and communicating with students with disabilities in schools.
- B. Continue updating and maintaining VR liaisons with schools and the school contact list for transitions.
- B. Continue relationships with OPI, PLUK, and MYLF.
- C. Continue to explore video conferencing for transition services.\
- D. Determine how many high school students we are serving, not serving, and who and where they are.
- E. Develop a public relation (PR) plan to reach students with disabilities, parents, school staff, and community agencies on transition services.
- F. Invite a school representative to discuss transitions in each region.
- G. Explore transition programs in other states.

- H. Hire a transition counselor/program officer to directly serve consumers and to develop transition practices. Determine if transition referrals increase.
- I. Create a strategy for improved access in schools.
- J. Develop urban and rural models of transition services.
- K. Serve 20 high school students through MYLF.
- L. Coordinate annually with disability services offices at university level (regional level).

3. Build awareness and understanding of VR services

Strategies:

- A. Educate legislators, consumers, and the general public on VR services by sending out quarterly updates through the Friends of Rehab email list.
- B. Explore the potential of TV/radio ads, maybe collaborating with MTAP.
- C. Invite at least one business in each region to do a presentation at a staff meeting.
- D. Expand career fair activity in more communities (as an employer and consumer resource).

4. Develop opportunities for better jobs and on-the-job supports for people who are working.

Strategies:

- A. Inventory methods of supporting consumers on the job following supported employment closures
- B. Expand resources for extended support services by asking the Legislature for more funding.

- C. Study and explore post-BA eligibility and educational opportunities.
- D. Invite the National Business Network to present at the 2008 All Staff meeting.

5. Enhance VR services specifically for people with mental illness, brain injuries, and learning disorders

Strategies:

- A. Require each region have a focus group on mental health issues.
- B. Get baseline information on how we serve consumers with mental illness, brain injuries and learning disorders: #26s; wage at closure; service rate, geographic areas. Develop a strategy to address areas of weakness.
- C. Encourage one counselor from each region to attend the NAMI conference each year to help develop “pockets of expertise” within the VR staff.
- D. Focus one state training event (All Staff or MAR) in 2008 on mental health issues. Find models and bring in representatives from successful programs.

6. Collaborate with other appropriate agencies and 121s to enhance outcomes for consumers.

Strategies:

- A. Write a letter to the DPHHS director stating how our needs assessment again identified transportation as one of the highest needs our consumers mentioned.
- B. Stay informed with what is going on in independent living and Montana Transportation Partnerships regarding transportation.

- C. Work with 121 projects to determine needs and alignment with VR. Contact the 121s and ask for input regarding the needs on their respective Reservations.
- D. Maintain joint training with 121 projects. Continue to notify the 121 projects about training opportunities such as All Staff, MAR conference, CTAT training opportunities, etc. Send the 121 projects any updated information on the MVR counselor manual.
- E. Continue good relationships with all the 121s. Visit each Reservation with a 121 project when invited.
- F. Provide technical assistance to the 121s when requested.
- G. Continue participation on federal benefits workshops on Reservations. Attend at least two federal benefits workshops per year on Reservations.
- H. Inform disability groups about progress being made on Medicaid Infrastructure Grant.
- I. Support inclusion of Medicaid Buy-In in the EPP process.
- J. Develop or improve the Community Rehab Program (CRP). Convene the CRP liaison group via telephone conference call four times per year to discuss CRP issues and possible solutions. Contact the CRPs regarding what their needs for improvement are in FY 2008.
- K. Identify and encourage additional CRP participation. The MVR/CRP rates committee will have at least two CRP representatives that serve on the committee. MVR will contact at least two mental health facilities in FY 2008 regarding their interest in becoming a provider for MVR.
- L. Participate in employer associations such as Workforce Centers, Community Management Teams, and One-Stops.
- M. Establish a liaison with Department of Corrections and become familiar with their programs related to disability.
- N. Continue inter-agency cooperation with OPI and other agencies.

- O. Meet with Job Service to understand their new role.
- P. Continue participation in local Mental Health advisory councils.
- Q. Invite other agencies (such as Job Service, Mental Health, DD, OPI) to present at VR Council meeting.
- R. Strengthen networking between VR and other agencies. In 2008, work with Mental Health and Job Service. In 2009, work with Veterans Administration and Brain Injury.
- S. Arrange for workforce presentations describing living wage and benefits (what's hot and what's not) once a year in each region.

7. Continue attention to in-service training and meeting CSPD qualifications.

Strategies:

- A. Continue to provide in-service training to staff so they continue to be qualified.
- B. Continue to require professional development plans for counselors.
- C. Continue in-service on new counselor training and training to remain current on disability trends.
- D. Develop specific training on VR public law and policy for counselors.
- E. Provide conflict and mediation training for MVR staff including mediation techniques when a counselor has to say no. Provide training on how to deal with consumers who are in crisis.
- F. Provide staff with information on employment trends (demographics, labor market, interagency linkages and changes).
- G. Continue good succession planning program and prepare for upcoming retirements of senior management.

- H. Continue cultural awareness activities including having a VR Council meeting on a Reservation, sending a counselor to CANAR. Look at the needs of urban Native Americans who do not live on a reservation.
- I. Explore video conferencing for training.
- J. Develop a forum for sharing best practices among the counselors such as setting up a column in the newsletter.

8. Expand our staff recruitment effort

Strategies:

- A. Analyze and determine optimal staffing needs considering job placement, transitions, travel, and number of cases.
- B. Enhance recruitment through internship project through Futures, participating in career fairs, making contacts with universities regarding employment opportunities, and identifying potential MVR consumers who are working towards a career in vocational rehabilitation. Provide information on VR/BLVS as a career to high school students.
- C. Recruit and hire a Deaf Coordinator in Great Falls.

(2) Outreach Activities to Identify and Serve Individuals with the Most Significant Disabilities who are Minorities

Native Americans represent the only significant minority group in Montana (7.5%). Montana has seven Reservations and thirteen tribes within autonomous governing bodies. The Little Shell Chippewa Tribe was recently granted Montana recognition and is expected to get federal recognition within the near future. MVR has counselors who serve consumers on each Reservation. These counselors coordinate with tribal agency staff to identify potential referrals and resources.

Native Americans with disabilities living on reservations face unique challenges. First, they are eligible for a combination of tribal, federal, and

state programs to meet their vocational and health needs. This requires extensive coordination and cooperation between agencies. Secondly, they are faced with significant cultural and economic barriers. Unemployment on these reservations varies from 27% to 76% (Bureau of Indian Affairs, US Department of the Interior). Today there are very few private or self-employment opportunities on Reservations: most employment comes through tribal and federal programs.

Montana is fortunate to have six Section 121 Vocational Rehabilitation Projects (Confederated Salish & Kootenai, Blackfeet, Chippewa Cree, Fort Peck, Fort Belknap, and Northern Cheyenne). This gives improved access to vocational rehabilitation services for persons with disabilities being served by the Section 121 Projects. MVR counselors assigned to these six reservations coordinate with each project staff as needed. In addition, the MVR program manager visits each 121 Project annually and provides technical assistance when requested.

Native American consumers living on reservations have a choice of either being served by the Section 121 Projects, state MVR, or in some cases, jointly by both parties.

Section 121 Projects have a better grasp of the cultural and service delivery barriers that exist on reservations and can help support MVR counselors as needed. In some cases, MVR has access to specialized programs, or services, which are not always found on reservations. MVR's efforts are to network, coordinate, offer technical assistance, and provide training opportunities for Project staff, to ensure consumers with disabilities have access to the full range of vocational rehabilitation services. Six cooperative agreements have been written and are monitored on an annual basis.

The Confederated Salish/Kootenai Tribes 121 Program has been approved as an Employment Network under the Ticket to Work Program.

In order to ensure that MVR is meeting the needs of Native Americans that do not live on or near the reservation, in the past year MVR staff has met with:

Great Falls Indian Family Health Center

Helena Indian Health Services

Butte North American Indian Alliance

Butte North American Indian Alliance Youth Program

MVR provided program and referral information, literature regarding MVR and MVR transitions, and discussed transition services for youth. In Great Falls, a counselor has been assigned as a liaison to the Indian Family Health Center to ensure that those eligible for MVR services receive the appropriate information, and are referred in a timely manner.

MVR will contact the Urban Indian Centers in Billings and Missoula in the coming year to provide information regarding MVR services, and to initiate a relationship with the programs.

The Native American sub-committee within the Vocational Rehabilitation Council has been very active, and has always had a great interest in the Section 121 Projects. This committee has been encouraging the last Reservation (Crow) to apply for a Section 121 grant. The sub-committee has encouraged the attendance of all Section 121 Project staff at Council meetings. At least once a year the Council asks one of the Section Project directors or coordinators to give a presentation to the Council on their Project's activity and accomplishments. In the last year, the sub-committee has changed its name and purpose. The name is now the unserved/underserved sub-committee and the purpose has been changed to research an array of other possible unserved/underserved populations and develop strategies for those populations in addition to the Native American population.

Overcoming Barriers to Equitable Access to and Participation in Vocational Rehabilitation and Supported Employment Programs

MVR is very proactive in identifying and overcoming barriers to consumers to access and participate in the vocational rehabilitation and supported employment experience. All the MVR district and field offices are in accessible locations. All district and field offices have toll-free voice and TTY capabilities and advertise this information to consumers, stakeholders, and other agencies through written public relations sources. All public

hearings, focus forums, and other meetings are held in locations that are accessible, and any other accommodations are made available as needed. All consumers are informed that alternate formats (Braille, diskette, large print, and auxiliary aides) are available upon request.

MVR makes special effort to provide interpreters for deaf and hard of hearing, or who speak foreign or native languages. Referrals may also be made to the Montana Telecommunications Access Program for telecommunication equipment needs and services. MVR's web page (www.dphhs.mt.gov/) is a valuable tool for consumers to access all types of disability information. MVR staff works with all partners in the One-Stop Centers and other agencies to assure consumers get the services they need to become employed.

The University of Montana Rural Institute (Rural Institute) has served as the implementing agency for MonTECH, Montana's federally funded assistive technology project since 1991. MonTECH's primary purpose has been to assist individuals with disabilities to maintain or increase their level of functioning and independence in all environments through the access to and use of assistive technology devices and services to consumers throughout the state.

Strategies:

Invite the MonTECH Project Director to showcase assistive technology devices at the 2008 MVR all-staff meeting.

Develop a training curriculum for new rehabilitation counselors regarding the services that MonTECH provides.

Look at the viability of providing webcams in each regional office so that counselors and their consumers can link with MonTECH to view assistive technology devices.

Provide loaner assistive technology devices for the visually impaired in three regional offices so that consumers can test the equipment to determine what best will meet their needs.

Attachment 4.11 (e)(2)

Evaluation and Report of Progress in Achieving Goals and Priorities and use of Title I Funds for Innovation and Expansion Activities

Use of Title I Funds for Innovation and Expansion Activities

Title 1 funds being used at this time are to support the Statewide Independent Living Council and the Montana Vocational Rehabilitation Council, which meet four times during the year to conduct business. Expenditures included travel, stipends, supplies, meeting room rental interpreters, facilitation services and costs related to consumer satisfaction.

Assessment of Montana Vocational Rehabilitation in meeting the Performance Standards and Indicators

Montana Vocational Rehabilitation (MVR) has always been very mindful of the federal standards and indicators and has monitored the development of its performance. Utilizing fiscal year 2007 data, MVR and the Council have assessed the agency's performance in meeting the minimum requirements for standards 1 and 2. The following is a report of last years performance related to the Standards and Indicators.

Standard #1: Employment outcomes

1.1 Number of rehabs

Federal Requirement: at least as many as in the previous year

Montana Results: 913 = 1 more than in 2007

Pass/Fail: Pass

1.2 Percent employed--Percentage of rehabs compared to all people who had plans written and were closed (Rehab rate)

Federal Requirement: at least 55.8%

Montana Results: 56.8%

Pass/Fail: Pass

1.3 Employed competitively--percentage of rehabs who are getting at least minimum wage

Federal Requirement: at least 72.6%

Montana Results: 96.3%

Pass/Fail: Pass

1.4 Significant Disability--Percentage of rehabs who are earning at least minimum wage who are significantly disabled

Federal Requirement: at least 62.4%

Montana Results: 81.3%

Pass/Fail: Pass

1.5 Earnings ratio--Average hourly rate of rehabs who are earning at least minimum wage divided by the state's average hourly earnings for all employed people

Federal Requirement: at least .52

Montana Results: .71 (preliminary number)

Pass/Fail: Pass

1.6 Self supporting--Look at all rehabs who are earning at least minimum wage. This item is the difference between the percent who report their own income as their largest source of support at closure and at application

Federal Requirement: at least 53.0

Montana Results: 54.5

Pass/Fail: Pass

Standard 2: Equal access / Minority ratio--service rate for minorities as a ratio to the service rate for non-minorities. Note: service rate is defined as the number of people who exited the VR program after receiving services divided by the total number of people exiting the program.

Federal Requirement: at least .80

Montana Results: .71

Pass/Fail: Fail

MVR has incorporated the standards and indicators into performance appraisals for staff. MVR and the Council will continue to monitor the performance outcomes throughout the year and work to consult with MVR Regional Administrators to assure compliance in meeting the required indicators. MVR tracks the indicators on a quarterly basis so adjustments can be made in areas that may need some attention.

Evaluation and Report of Progress in Achieving Goals and Priorities

As a note on how the American Recovery and Reinvestment Act (ARRA) funds will be utilized to achieve the following Goals and Priorities. At this time, the final guidance on expending the ARRA funds has not been received and therefore specific plans for spending the funds have not been made. However, the general guidelines for the ARRA funds are to support areas where other cuts could impact services in an effort to continue to meet Goal 1. The second area for expending funds relates to improving infrastructure, particularly in the area of technology and other areas where recruiting VISTA members are alluded to in the following discussion of goals and strategies. The third area is in the area of providing support to MVR partners some of those potential plans are described in the items requiring further investigation, which comes after the discussion of goals and strategies.

The following describe actions taken in support of MVR's Goals and Priorities identified in the previous State Plan:

1. Successfully assist people with disabilities to achieve their employment goals.

A. Continue to meet the standards and indicators, our federal report card.

Montana met all the standards and indicators in 2007. In 2008, MVR met all the standards and indicators except the minority ratio.

B. Continue achieving high consumer satisfaction feedback by meeting or exceeding 85% on consumer survey question #10, "In an overall general sense, how satisfied are you with the services you received?"

In 2007 MVR general program had an 85% positive response rate.

In 2008 MVR general program had an 86.9% positive response rate following the initial distribution of surveys. MVR is in the process of a second request for survey completion to participants who did not respond to the first request.

C. Refine our methods to identify unserved and underserved populations and how to serve them. Evaluate methods over the next three years on developing ways to measure unserved and underserved.

The VR Council continues to work on this. Also, MVR has applied for a VISTA worker to address serving the unserved and underserved populations. In addition, the TACE center will be helping MVR look at this.

D. Make available a list of qualified benefits planners.

Each region has done this. Most of Montana's benefit planners are housed in the independent living centers.

E. Offer referral to benefit planners (CWICs) at intake to new SSI and SSDI clients.

In the Billings region, the benefits planning list and introductory statement are included in each new application package and are reviewed with SSA applicants.

In the Butte region, all counselors have begun offering benefits planning to referred or active SSA applicants.

In the Great Falls region, information on benefit planning services available to SSA recipients is provided at weekly MVR informational meetings, and is followed up with more detailed information at the initial meeting with the counselor.

The Missoula region currently does not have a certified planner in Missoula, but does encourage case managers of consumers in the mental health system to facilitate benefits analysis prior to MVR referral. There are benefit planners in the Kalispell and Hamilton, which are in the Missoula region and referrals are made in those communities when appropriate.

F. Increase the percentage of rehabilitated consumers who have health insurance at closure.

The following table shows insurance rates since the baseline year of fiscal year 2006:

Year/insurance coverage	2006	2007	2008
Employer insurance	26.1%	26.2%	25.3%
Any insurance including Medicaid or Medicare	69.5%	70.9%	72.5%

G. Have CRP liaisons find out from placement specialists what the need, availability and use of soft skills training is in their region. Also have the workforce liaisons investigate this.

Each region has identified resources in their region

H. Train consumers in transportation options by asking the independent living centers to present travel training at each regional office every two years.

Billings region: In 2008, during a regional staff meeting, Independent Living (LIFTT) presented training on, and discussed transportation options in that region. Both MVR and LIFTT have representation on and participate in Transportation Advisory Councils (TACs).

Great Falls region: The regional administrator regularly participates in TAC meetings. Information obtained is brought back to the regional staff. North Central Independent Living Services has been invited to make a presentation on transportation and “travel training”.

Missoula region: The counselor supervisor has attended community meetings regarding transportation.

Blind and Low Vision: Orientation and Mobility Specialists provide training to consumers in the use of alternative transportation options.

I. Provide more access regarding new and emerging technologies by providing training at statewide events such as the annual All Staff meeting. Sources of training could be PLUK and the Rural Institute.

MVR is exploring the use of video phones and polycom internet based technology for IEPs and training.

BLV hired an assistive technology specialist in the fall of 2007.

Assistive technology training was held at MonTech in August 2008 and June 2009. Representatives of each region attended, and the training received high compliments. The plans are to continue this training for the foreseeable future.

Video technology is being used in MVR offices to communicate with deaf consumers.

MVR is planning on recruiting a VISTA member to assist with the initial research and planning for development of the use of technology to assist with meeting the needs of covering the vast rural areas of Montana.

2. Assure that consistent, high quality transition services are made available statewide

A. Continue identifying and communicating with students with disabilities in schools.

Visually impaired high school students at the Montana School for Deaf and Blind (MSDB) toured the Great Falls office and their low vision room; Blind and Low Vision staff toured the MSDB campus.

MVR hired a transitions counselor who has office hours in the Missoula high schools.

MVR helped host a transitions conference in Great Falls in September 2008.

MVR has distributed posters to schools, and staff has contacted counselors, teachers and administrators.

MVR employees regularly participate in career fairs, attend IEP meetings, and make presentations at the schools.

Brigitte Winfield presented at the Developmental Disabilities Autism work group in February 2009.

B. Continue updating and maintaining VR liaisons with schools and the school contact list for transitions.

A counselor is assigned to each high school in Montana, and the list of these contacts is updated in the VR central office. This list is accessible on the MVR website. MVR and OPI are working together to make the list more user friendly

C. Continue relationships with OPI, PLUK, and MYLF.

During July 2007 and July 2008, counselors from each region participated in MYLF and met students from their regions. Counselors from each region have been identified and made the commitment to continue this activity at MYLF in 2009. This activity will continue for the foreseeable future.

Brigitte Winfield from central office, actively participated in planning the transitions conference held in Great Falls in September 2008.

MVR has a signed cooperative agreement with OPI.

A combined Montana Association of Rehabilitation/Transitions conference is slated for October 2009. MVR central office and field staff are part of the planning team for this conference.

D. Continue to explore video conferencing for transition services.

Video conferencing is being used for IEPs, meetings between offices, and meetings with deaf consumers. There have been issues with compatibility of services - not everyone has the same system, and most systems only work with ones from the same manufacturer. As mentioned previously, MVR is recruiting a VISTA member to assist with research this type of issues.

E. Determine how many high school students we are serving, not serving, and who and where they are.

MVR is recruiting a Vista member to assist with gathering this information on this issue.

F. Develop a public relation (PR) plan to reach students with disabilities, parents, school staff, and community agencies on transition services.

Public relations efforts with the schools include distributing posters and brochures, contacting individual schools, making presentations, and having counselors attend MYLF. At least one counselor from each region attends MYLF for an entire day and makes contacts with students from that region.

The new transitions counselor has regular office hours in the Missoula high schools, and she has developed a web presentation for parents, agency representatives, and teachers.

G. Invite a school representative to discuss transitions in each region.

This has been done sporadically. However, the Great Falls region notes that “having liaison responsibilities with each of our high schools is starting to pay dividends. School personnel are spending more time in our offices and routinely accompanying transitioning students to orientation sessions.”

H. Explore transition programs in other states.

The transitions counselor has attended national meetings and has met with leaders in the transitions effort. The Rural Institute staff keep VR counselors informed about transitions trainings and news.

I. Hire a transition counselor/program officer to directly serve consumers and to develop transition practices. Determine if transition referrals increase.

The 2007 Legislature appropriated funding for a transitions counselor which was hired for the Missoula region.

Since the inception of the project, the Transitions Counselor has:

Established weekly hours at each of the aforementioned high schools to ensure ease of access for students, parents and teaching staff.

Developed instructional materials on transitions (PowerPoint presentation and article) and presented them to various local, state, and national groups (students, teachers, parents in western Montana schools districts—Missoula, Mineral, Sanders, Lake, Ravalli—and attendees of a nationally conducted seminar) in a variety of mediums, including face-to-face group meetings, and the Rural Institute's Newsletter and nationally conducted "webinar."

Developed succinct "Cooperative Agreement," outlining the roles of both the teacher and the VR counselor in initiating and carrying out transition activities on behalf of Montana's students with disabilities.

Produced online "Transitions Kit" containing the materials described above to guide VR counselors who serve school districts across Montana.

Participated on the Montana Youth Transitions project, helping to produce the 1st Annual Transitions Conference attended by 145 youth, parents, and professional staff; and the Montana transitions website. The transitions counselor is also on the team planning the 2nd Annual Transitions Conference to be held in October 2009.

Participated on Governor Schweitzer's Transitions Taskforce Committee with the goal of improving transition services for Montana's students with disabilities.

There will be follow up on whether the new position increases referrals in the area served, but the initiative is too new at this time to pursue this issue.

J. Create a strategy for improved access in schools.

The Billings Region has developed the strategy of developing contacts in each school, making sure that each school has materials on MVR including brochures, and placing a poster in each school that has business cards attached.

In the Great Falls Region, counselors visit their assigned schools on a regular basis to meet with students and do presentations for families and

staff. This year, Great Falls vocational educators have been accompanying prospective transition students to the weekly informational meetings. This has provided an opportunity for more students to obtain information about VR services.

In the Missoula region, the transitions counselor has regular office hours in the high schools. Counselors struggle with getting schools to recognize the need to make appointments 3-4 weeks in advance.

K. Develop urban and rural models of transition services.

The Missoula transitions counselor has developed an electronic transitions kit which will be shared with VR staff at All Staff and then made available to school staff. By using this kit, we hope that the VR transitions information will be more consistent across the state.

Billings region initiated the Poly-Com project (video conferencing). It is intended to be a rural model of providing transitions communication and possibly meeting attendance at IEPs in rural areas

L. Serve 20 high school students through MYLF.

Eighteen students attended MYLF in July 2007, and 20 students attended in July 2008. MYLF has 26 applicants this year.

During the forum, the delegates developed personal leadership and resource plans. The students are contacted monthly (for 1 year) by MYLF staff to see if they need assistance in the areas of college preparation, accessibility issues, implementation of their leadership plan, requesting accommodations, applying to Vocational Rehabilitation, and/or self advocacy.

M. Coordinate annually with disability services offices at university level (regional level).

In the Missoula region, a counselor met with the student support coordinator of the College of Technology.

In the Great Falls region, the Blind and Low Vision Services counselor regularly contacts the disability services director at the College of Technology. The disability services coordinator observed a low vision evaluation. Also, region staff took part in a disability awareness fair at the College of Technology. They have established formal liaison

responsibilities with all units of the university system and private institutions in their region.

Blind and Low Vision staff presented on disability issues at the University of Great Falls, and Billings BLVS staff met with the student disability coordinator at Miles City Community College.

The Deaf Services program manager has been negotiating with units of the university system to clarify the existing memorandum of understanding and standardize interpreter fees and payment practices across the state.

3. Build awareness and understanding of VR services

A. Educate legislators, consumers, and the general public on VR services by sending out quarterly updates through the friends of rehab email list and by exploring TV and radio ads.

Updates were sent to friends of rehab updating them on progress on legislation related to MVR, announcing the public hearing, and clarifying some issues raised at this year's public hearing.

B. Invite at least one business in each region to do a presentation at a staff meeting.

The Missoula region invited Blackfoot Communications.

The Great Falls region invited Skills'kin. This employer has contracts to provide janitorial contracts at Air Force bases in the pacific northwest, including Malmstrom Air Force Base.

The Billings region had SAGE attend a staff meeting to talk about training.

Some of the businesses making presentations in previous years covered by this plan include Yellowstone County, Kids Management Authority, Malmstrom AFB, and Cable Technologies Inc.

C. Explore the potential of TV/radio ads, maybe collaborating with MTAP.

An MVR Council member has been working with the Butte region staff to develop a 30 – 60 second public service announcement.

D. Expand career fair activity in more communities (as an employer and consumer resource).

MVR staff participates in (host a booth) at career fairs, health fairs, and job fairs across their regions on a regular basis.

4. Develop opportunities for better jobs and on-the-job supports for people who are working.

A. Train staff on post-BA eligibility and educational opportunities.

The final policy has been developed and training is taking place.

B. Inventory methods of supporting consumers on the job following supported employment closures.

This inventory was completed and reported on in last year's state plan. Since that time the following have been identified:

There is also a VA program that provides ongoing supports for head injury and some other specific disabilities.

In some cases, the Senior and Long Term Care Medicaid Waiver will provide long term support.

The possibility of using work related expenses as a part of the Social Security work incentives as source of support in certain cases is being explored.

C. Expand resources for Extended Employment program by asking the Legislature for more funding.

Increased funding for Extended Employment was included in the Governor's budget for the 2011 biennium. The Legislature passed the legislation. The new resources will increase the number of consumers who can be served through the Extended Employment program by 39 over the next two years.

D. Invite the National Business Network to present at the 2008 All Staff meeting.

This was not completed because Montana does not have the large national employers typical of partnerships with the network.

5. Enhance VR services specifically for people with mental illness, brain injuries, and learning disorders

A. Require that each region have a focus group on mental health issues.

This was done in fiscal year 2008 and the results were reported in last year's state plan.

B. Get baseline information on how we serve consumers with mental illness, brain injuries and learning disorders: #26s; wage at closure; service rate, geographic areas. Develop a strategy to address areas of weakness.

The MVR central office has developed a chart with the factors described above for fiscal years 2007 and 2008. Shortly after October 2009, the data for fiscal year 2009 will be gathered. The data will be reviewed to determine the impact of trainings held during the last three years have had on services to the identified populations. In addition, areas that indicate significant differences from comparable areas will be reviewed for possible intervention strategies.

C. Encourage one counselor from each region to attend the NAMI (National Association of Mentally Ill) conference each year to help develop "pockets of expertise" within the VR staff.

This is being done each year.

D. Focus one state training event (All Staff or Montana Association for Rehabilitation (MAR) in 2008 on mental health issues. Find models and bring in representatives from successful programs.

Presentations made in fiscal year 2008 were reported in last year's plan.

A presentation on communication issues and working with persons with personality disorders and a presentation on working with persons with personality disorders from a VR counselor perspective were made at the 2009 All Staff training.

6. Collaborate with other appropriate agencies and 121s to enhance outcomes for consumers.

A. Write a letter to the DPHHS director stating how our needs assessment again identified transportation as one of the highest needs our consumers mentioned.

MVR worked with the director's office to hire a transportation coordinator for the Department of Public Health and Human Services and MVR has meet regularly with the transportation coordinator since the position was hired to keep them informed of the needs of MVR consumers in the area of transportation.

B. Stay informed with what is going on with independent living and Montana Transportation Partnership regarding transportation.

In Missoula, staff from Summit Independent Living Center presented to a VR staff meeting in May 2009.

There are regular reports on the activities of the Montana Transportation Partnership made at the Statewide Independent Living Council meetings.

C. Work with 121 projects to determine needs and alignment with VR. Personally contact the 121s and urban Indian programs and ask for input regarding their needs.

A VR counselor and the Missoula regional manager are on the Salish Kootenai Rehab Advisory Council.

In Billings, the Chief Dull Knife College 121 project has had some management changes. MVR is providing support and training on a monthly basis as requested and is managing joint cases.

Great Falls BLVS staff contact the 121s when they are in the area.

Great Falls VR has joint cases with the 4 Section 121 projects in their area. A VR counselor will make a presentation to the Great Falls Indian Center. Staff from the Indian Center will be guests at an MVR weekly staff meeting to increase collaboration and learn about services provided by both programs.

In the last year the cooperative agreement with Assiniboine Sioux Vocational Rehabilitation was updated and the cooperative agreement with the Chief Dull Knife College Vocational Rehabilitation Project was completed. MVR now has cooperative agreements with all six 121 projects operating in Montana.

Great Falls Indian Family Health Center

Missoula regional staff have met with the Missoula Native American Center

There are plans to arrange a meeting of the Helena MVR office staff to meet with the Helena Indian Alliance later this year

D. Maintain joint training with 121 projects. The MVR 121 liaison will continue to notify the 121 projects about training opportunities such as All Staff, MAR conference, CTAT training opportunities, etc. Send the 121 projects any updated information on the MVR counselor manual.

MVR sent the following notices to all six 121 projects:

Exploring the Route: Meeting the Unique Employment Needs of Your Customers (10-7-2008)

National Brain Injury Employment Conference (10-21-2008)

Get Work Now – The Foundation of Employment Services; The Proven Process for Successful Job Placement; Meeting the Unique employment Needs of your Customers (1-6-2009)

Teletrainings available through CTAT (2-2-2009)

TACE Newsletter February 2009 (2-5-2008)

Empowerment Conference for Native Americans (2-18-2009)

Autism and Autism Spectrum Disorders (3-6-2009)

Training Resource Network Disability Update (4-6-2009)

ILRU Transition teleconference (4-7-2009)

Ethical Decision Making (4-8-2009)

SSI/SSDI Outreach, Access and Recovery (4/14/2009)

MVR All Staff (4-16-2009)

A Practical Overview of Mental Health Disorders and Related Interventions (6-12-2009)

Four staff of the Chief Dull Knife College Vocational Rehabilitation Project attended the 2009 MVR All Staff training.

E. Continue good relationships with all the 121s. Visit each Reservation with a 121 project when invited.

The MVR 121 liaison met with 121 Project Directors (at their invitation) on the Salish Kootenai Reservation (April 2009) and the Rocky Boy's Reservation (April 2009).

The liaison attended Empowerment of Native Americans with Disabilities in April 2009 and meet with representatives of the Chief Dull Knife College Vocational Rehabilitation Project and the Fort Belknap Vocational Rehabilitation Project.

The MVR liaison hopes to meet with the other Section 121s before the end of the year.

The Great Falls BLVS counselor is teaming with MonTECH, Montana Telecommunications Access Program (MTAP) and the Montana State Library to conduct a disability services day-long presentation at each reservation in his area.

F. Provide technical assistance to the 121s when requested.

The central office liaison to Section 121 projects, has been in contact with the 121 projects to provide technical assistance. Issues where assistance was provided included:

Training resources,

Information on developing self employment plans,

Resources related to becoming an employment program in the ticket to work program,

How to handle workers compensation issues related to work experience and on-the-job training issues.

G. Continue participation on federal benefits workshops on Reservations. Attend at least two sessions a year.

MVR has presented at the workshops on the following reservations in the last two years:

Flathead Reservation – October 2008

Rocky Boy's Reservation – April 2009

Crow Reservation – May 2009

H. Inform disability groups about progress being made on Medicaid Infrastructure Grant.

The Medicaid Infrastructure Grant was passed by the 2009 Montana Legislature and signed by the Governor.

Peggy Williams of central office is on the work group planning implementation of the legislation. She will continue to keep disability

groups informed on progress regarding implementation of the Medicaid Infrastructure Grant.

I. Support inclusion of Medicaid Buy-In in the Executive Planning Process (Governor/state agency planning process for each legislative session.)

This was done and as noted previously the support was successful.

J. Convene the CRP liaison group via telephone conference call four times per year to discuss CRP issues and possible solutions.

We have had meetings in January, March, and June this year. An additional meeting is anticipated before the end of the fiscal year.

K. Identify and encourage additional CRP participation. The MVR/CRP rates committee will have at least two CRP representatives that serve on the committee.

Two new CRPs were added in the last year: South Central Mental Health and Region IV Family Outreach. There have been contacts with a Mental Health provider in western Montana regarding becoming a CRP and contacts with potential providers in a community in southwestern Montana that currently does not have CRP services.

L. Participate in employer associations such as Workforce Centers, Community Management Teams, and One-Stops.

All offices participate on their local Community Management Teams (some staff are officers) and many belong to the Job Service Employers Council (JSEC).

M. Establish a liaison with Department of Corrections and become familiar with their programs related to disability.

A liaison has been established in the Missoula Region.

The Butte Region has regular contact with various programs related to the Department of Corrections such as: Warm Spring Addiction Treatment and Change (WATCH) and Corrections Connections on the Warm Springs

campus. Contact with Sanction Treatment Assessment Revocation & Transition (START) is anticipated before the end of the year. The Butte office also responds to any requests from the state prison, but has not received any requests recently.

The Great Falls office has a liaison with the NEXUS Methamphetamine Treatment Center in Lewistown, the Great Falls Transition Center, and the Cascade County Regional Detention Center.

N. Continue inter-agency cooperation with OPI, Higher Education, and other agencies.

MVR has developed cooperative agreements with multiple agencies as noted in attachments 4.7 (b)(3) and 4.8 (b)(1). Agreements with OPI and Higher Education were updated recently.

O. Meet with Job Service to understand their new role.

This has been done. The Billings VR office is co-located with the workforce center (Job Service).

P. Continue participation in local Mental Health advisory councils.

Each region has participation on Mental Health advisory councils.

Brigitte Winfield of central office participates on the statewide Mental Health Oversight Advisory Council.

Q. Invite other agencies (such as Job Service, Mental Health, DD, OPI) to present at a VR Council meeting.

Julia Doney President of the Fort Belknap Tribal Council presented at the October 2008 Council meeting.

R. Strengthen networking between VR and other agencies. In 2009, work with Veterans Administration and brain injury.

Great Falls region participated in a Community Service Provider Fair on May 5 sponsored by Department of Labor.

Brain injury was the featured topic at the 2009 All Staff meeting. A consumer with a brain injury presented on her progress toward with and success with becoming a self employed person.

S. Arrange for workforce presentations describing employment trends, living wage and benefits (what's hot and what's not) once a year in each region.

Regions have approached this in different ways. In some cases, Job Service has presented at a weekly staff meeting.

Billings region, is collocated with Job Service, regularly receives information on businesses that are opening or closing.

In other areas, staff attend CMT presentations related to the economy, etc.

Specific activities in the last year include:

In Billings region, a workforce training program was held May 6.

In Missoula region, fall training is in November and VR staff will attend.

In Butte region, VR will explain VR services to the Workforce group on May 7.

7. Continue attention to in-service training and meeting CSPD qualifications.

A. Continue to provide in-service training to staff so they continue to be qualified.

Each year, an annual needs assessment is completed by the field staff to assist with determining training needs.

Counseling staff without a masters degree are required to get their masters degree as a condition of hire. MVR will pay for the schooling cost (or will help find a stipend to cover the cost).

Blind and Low Vision instructional staff must also get their masters degree, and MVR pays for their schooling.

All Staff training was held in May 2009, training by the statewide assistive technology project occurs was held in June 2009, Montana Association for Rehabilitation and Bi-District training will be held in the fall.

B. Continue to require professional development plans for counselors.

MVR reviews them annually.

C. Continue in-service on new counselor training and other training to remain current on disability trends.

MVR Futures developed a new counselor training guide.

Brigitte Winfield MVR central staff provided two 3-day sessions of onsite training to new counselors in Kalispell.

The TACE center provides opportunities for training on the web on current trends and staff are made aware of the opportunities.

D. Develop specific training on VR public law and policy for counselors.

Staff of the TACE center will be presenting on this topic at the bi-district trainings scheduled for November 2010.

E. Provide conflict and mediation training for MVR staff including mediation techniques when a counselor has to say no. Also provide training on how to deal with consumers who are in crisis.

MVR is providing the training, “Nonviolent Crisis Intervention” to the regions per their requests.

Over the past two years there have been multiple trainings for staff on mental health issues and the topics above have been covered in portions of those trainings.

F. Provide staff with information on employment trends (demographics, labor market, interagency linkages and changes.

Staff are invited to attend CMT (Community Management Team) events, and this information is shared at staff meetings.

G. Continue good succession planning program and prepare for upcoming retirements of senior management.

The Futures project is still providing good experience for people who are interested in moving up in the organization.

Also, Staff have attended the state government training: “Essentials of Management” training. Staff have also been selected to attend the “Emerging Leader,” which is a national training.

H. Continue cultural awareness activities including having a VR Council meeting on a Reservation, sending a counselor to CANAR. Look at the needs of urban Native Americans who do not live on a reservation.

In October 2008, the VR Council meeting was held on the Fort Belknap Reservation. In August 2009, the VR Council meeting will be held on the Rocky Boy’s Reservation.

The VR counselor in the Havre field office attended CANAR in May 2009.
The Havre field office serves three reservations

MVR staff has met with or is planning to meet with the following Native American urban centers to provide program and referral information, literature regarding MVR:

Missoula Native American Center (this Center had not been met with the previous year)

Great Falls Indian Family Health Center

There are plans to arrange a meeting with the Helena Indian Alliance later this year

I. Explore video conferencing for training.

MVR is exploring the potential for video conferencing in a variety of areas including training. MVR is recruiting a VISTA member to assist with initial stages of planning for these types of activities.

J. Develop a forum for sharing best practices among the counselors such as setting up a column in the newsletter.

This has been done on a regional level.

8. Expand our staff recruitment effort

A. Analyze and determine optimal staffing needs considering job placement, transitions, travel, and number of cases.

This is done to some degree on an ongoing basis. Additional staff resources would be necessary to complete a thorough analysis.

B. Enhance recruitment through expanding internships through Futures, participating in career fairs and making contacts with universities regarding employment opportunities. Identify potential MVR consumers who are working towards a career in vocational

rehabilitation. Provide information on VR/BLVS as a career to high school students.

The Billings region hosts internship students. Because internships are not paid and most of the interns come from the Billings area, other regions do not host as many interns as Billings. Many interns are later hired into counselor positions.

Blind and Low Vision has hired trainees into some of their hard-to-recruit instructional staff positions. They then complete their masters degree with MVR financial assistance.

Other offices have presented to college classes on opportunities for employment in Vocational Rehabilitation.

MVR is recruiting three VISTA members in the upcoming year to assist with initial stages of a variety of activities discussed in this plan. All members would be college graduates and the experience of working with MVR may recruit them to a career in vocational rehabilitation.

MVR has participated in job fairs, youth fairs, and youth awareness days at local schools to bring the awareness of rehabilitation to the public.

C. Recruit and hire a Deaf Coordinator in Great Falls.

Bob Ellesch started this job in January 2008

The following activities have been designated for further investigation and have been determined to require additional resources. The feasibility of action on these activities is to be reviewed annually.

- **Make more time available between counselors and consumers.**

MVR works on this issue on an ongoing basis. However, at this time there are no specific identifiable major activities addressing this issue.

- **Provide more financial support for Business Enterprise Program.**

This activity may be pursued in the upcoming year based on MVR obtaining further information on ARRA funds.

- **Orient school administrators and guidance counselors regarding transitions and VR.**

This is an ongoing activity for counselors in their assigned school. This is an area that the Missoula region transition counselor is working on to develop procedures that can be utilized statewide. These efforts have produced materials that could be beneficial in this regard and template for outlining the transition responsibilities of the MVR counselor and school personnel.

- **Develop a video on orientation for vocational goal development to help consumers understand their role. Watch the consumer satisfaction survey to monitor trends on concerns with goal development.**

No action is under consideration for this activity at this time.

- **Continue development of new materials for consumers. Find websites to help consumers focus on the VR process, including interest/vocational inventories. Refer this strategy to the Futures application package group.**

A Missoula counselor is reviewing workbooks for students that would include interest test results.

- **Inform consumers about the VR process and the full array of services.**

MVR is working on improving in this area at all times. Specifically, in Missoula region CRPS have been requested to develop their own informational brochures and a packet with all brochures are provided to consumers if CRP services are being considered. Consumer choice is a training topic that has been chosen to be addressed. The exact format and schedule have not been developed at this time.

- **Train employers in how to accommodate, support, communicate, and supervise employees with brain disorders and other disabilities.**

As mentioned in many of the activities above brain injury has been a training topic at various times in recent years.

Also of note, much of the work with employers in the areas emphasized above is dealt with by CRPs, especially for consumers with particularly difficult issues. The CRP liaison frequently sends information to CRPs on trainings that address issues mentioned above.

- **Develop more “natural support” for consumers requiring extended support.**

A Missoula counselor is looking in to using Social Security work incentives as a way for consumers to start into extended employment.

- **Train employers in how to accommodate, support, communicate, and supervise employees with brain disorders and other disabilities.**

As mentioned in many of the activities above, brain injury has been a training topic at various times in recent years.

Also, of note is that much of the work with employers in the areas emphasized above is dealt with by CRPs. The CRP liaison frequently sends information to CRPs on trainings that address issues such as mentioned above.

- **Develop a three year public relations plan for each region targeting employers.**

Nothing as formal as a public relations plan has been developed, but public relations activities with an employer emphasis have been implemented in the last year and those activities were presented previously in this document.

- **Team up with private associations like NAMI to educate the public.**

A Kalispell VR counselor attends NAMI meetings and another Kalispell counselor will present to the Libby LAC.

- **Emphasize models and use of team case management; collaborate with other agencies, such as mental health case manager.**

While individual counselors are involved with some activities suggested above in individual cases, there are no specific initiatives at this time in this area.

- **Provide counselors training on models of team case management.**

There are no plans in this regard presently.

Attachment 6.3

Quality, Scope, and Extent of Supported Employment Services

Quality, Scope, and Extent of Supported Employment Services

Supported Employment Definition

The Act as amended defines supported employment as:

Competitive work in integrated work settings, or employment in integrated work settings in which individuals are working toward competitive work, consistent with the strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice of the individuals with the most significant disabilities for whom competitive employment has not traditionally occurred; or has been interrupted or intermittent as a result of a significant disability; and who, because of their nature and severity of their disability, need intensive supported employment services for the period, or extended services to perform such work. This also includes transitional employment for persons with the most significant disabilities due to mental illness.

Quality of Supported Employment

Montana Vocational Rehabilitation, through its cycle of services planning process, certifies providers who will be making supported employment time limited services available. This certification process ensures that the providers of services maintain the necessary education, skills, and degree of professional expertise to provide a level of service commensurate with MVR's work service standard. MVR values its priority partners who have the necessary accreditation. Supported employment providers evaluated by the Developmental Disability system or Mental Health system represent the majority of our providers. CARF (Commission on Accreditation of Rehabilitation Facilities) is also utilized by providers. Other providers are certified through CARF (Commission on Accreditation of Rehabilitation Facilities) or individuals who have been selected to provide services for a limited number of consumers in a rural area.

Scope of Services

The scope of services available may include one or more of the following services depending on the individual's needs:

Vocational Evaluation/In-House
Vocational Evaluation/Community Based
Supported Employment/Extended Support Services
Supported Employment/Developmental Disabilities (DD)
Supported Employment/Mental Health (MH)
Supported Employment/Other
Follow-Along Extended Support Services
Job Placement Services/Job Finding

Extent of Supported Employment

An individual shall be eligible to receive supported employment services using Title VI Part B funds if:

- 1) The individual is eligible for vocational rehabilitation services.
- 2) The individual is determined to be an individual with the most significant disabilities; and
- 3) There is comprehensive assessment of rehabilitation needs of the individual including an assessment of rehabilitation career and job needs, and identifies supported employment as the appropriate rehabilitation objective for the individual.

Cooperative Agreements: When a goal requiring supported employment is identified in the IPE, a document (cooperative agreement) signed and dated by the extended service provider reflecting the commitment of extended service provisions will be placed in the file prior to closure. If the cooperative agreement is dated after the IPE, there must have been reasonable expectation that extended services were to be available prior to closure.

Funding extended support services prior to closure: For the 90 days preceding closure, the extended support services provider must have met the individual's support needs without VR time limited funding.

MVR provides time-limited services needed to support an individual in employment. MVR can fund a maximum of 18 months of job coaching and follow-along services unless the Individualized Plan of Employment (IPE) indicates that more than 18 months of services are necessary for the

individual to achieve job stability prior to transitioning to extended support services.

Prior to the purchase of supported employment services, the need for services, the appropriate extended support services and funding, and the appropriate agency to provide the services are established and identified on the IPE. The VR counselor secures a signed cooperative agreement from the provider to guarantee ongoing support.

Supported employment services are available statewide.